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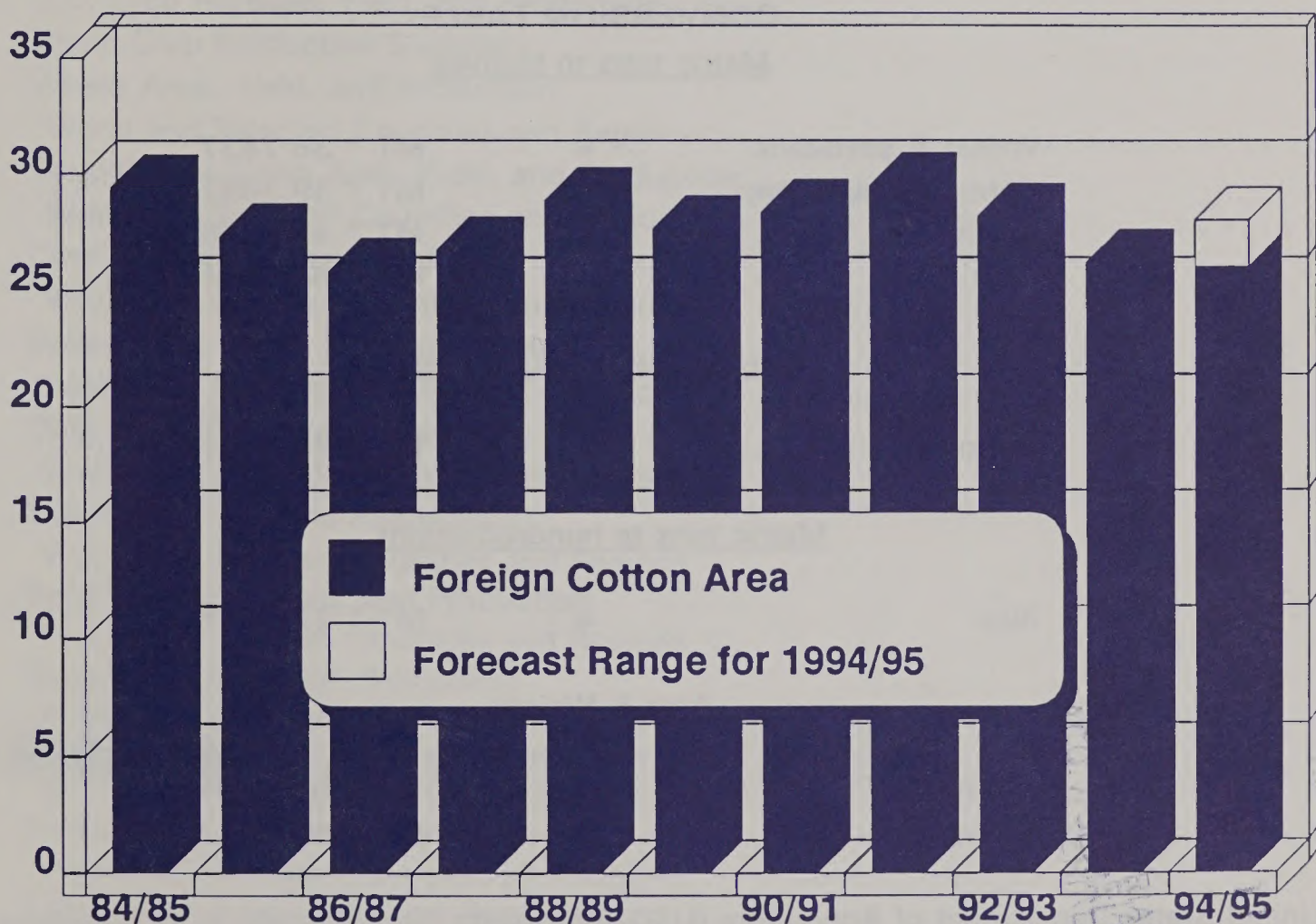
Foreign
Agricultural
Service

Circular Series
WAP 2-94
February 1994

Sta

World Agricultural Production

1994/95 Forecast of Foreign Cotton Area Million Hectares



Production Articles This Month...

Foreign Cotton Area
World Rice
Russia 1993 Agricultural Results
India Soybeans
Fresh Deciduous Fruit
China Agriculture
Dairy Production in Selected Countries

This report draws on information from USDA's global network of agricultural attaches and counselors, official statistics of foreign governments, other foreign source materials, and results of office analysis. Estimates of U.S. acreage, yield, and production are from the USDA's Agricultural Statistics Board, except where noted. This report is based on unrounded data; numbers may not add to totals because of rounding. This report reflects official USDA estimates released in the World Agricultural Supply and Demand Estimates (WASDE-287), February 10, 1994.

This report was prepared by the Production Estimates and Crop Assessment Division (PECAD), FAS/USDA, Washington, D.C. 20250. Further information may be obtained by writing to the division, by calling (202) 720-0888, or by FAX (202) 720-8880.

The next issue of World Agricultural Production will be released at 3 p.m. Eastern time on March 11, 1994.

CONVERSION TABLE

Metric tons to bushels

Wheat & soybeans	=	MT * 36.7437
Corn, sorghum, rye	=	MT * 39.36825
Barley	=	MT * 45.929625
Oats	=	MT * 68.894438

Metric tons to 480-lb bales

Cotton	=	MT * 4.592917
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Metric tons to hundredweight

Rice	=	MT * 22.04622
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Area & Weight

1 hectare	=	2.471044 acres
1 kilogram	=	2.204622 pounds

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PRODUCTION HIGHLIGHTS FOR 1993/94

February 1994

WHEAT

<u>Country</u>	----- Current Estimate MMT	1993/94 Monthly Change MMT	----- Monthly Change (%)	Change From 1992/93 (%)	<u>Comments</u>
World	562.4	+2.8	+1	+0	This year's crop is only slightly above last season due to an increase this month in total foreign output.
United States	65.4	NC	NC	-2	No change this month.
Total Foreign	497.0	+2.8	+1	+1	Production is estimated higher due to increased output in Australia and the FSU-12.
FSU-12	85.6	+2.2	+3	-3	Statistics released by the Commonwealth of Independent States (CIS) Statistics Committee indicated that in Russia, Ukraine, and Kazakhstan wheat output was higher than expected.
Australia	18.0	+0.7	+4	+11	Production is estimated higher based on revised estimates from the Australian Bureau of Agricultural and Resource Economics (ABARE). Yield is estimated at a record level.

COARSE GRAINS

<u>Country</u>	----- Current Estimate MMT	1993/94 Monthly Change MMT	----- Monthly Change (%)	Change From 1992/93 (%)	<u>Comments</u>
World	776.6	-3.3	-0	-9	The 1993/94 crop is reduced this month due to lower estimated foreign production.
United States	187.5	NC	NC	-33	No change this month.
Total Foreign	589.1	-3.3	-1	+2	Production is estimated lower as harvest results from the FSU-12 and the European Union indicated smaller coarse grain output.
FSU-12	88.2	-4.7	-5	-5	Total grain estimates from the CIS indicate lower 1993 coarse grain output. Russia's estimated output is 4 percent lower this month, Ukraine's 2 percent lower, and Kazakhstan's 17 percent lower.
European Union	82.4	-0.5	-1	-0	Official estimates from Denmark lowered the barley production estimate; however, corn output in France is estimated higher.

COARSE GRAINS (CONT'D)

<u>Country</u>	----- Current Estimate MMT	1993/94 Monthly Change MMT	----- Monthly Change (%)	Change From 1992/93 (%)	<u>Comments</u>
South Africa	11.1	+1.0	+10	+10	Corn production is forecast higher due to continued favorable rainfall and moderate temperatures.
Australia	9.6	+0.4	+4	+16	Barley and oat estimated production are increased based on revised ABARE data. Barley output is estimated at a record level.
Eastern Europe	43.0	+0.3	+1	+3	Barley production in Romania is estimated higher based on higher harvested area and yield.

WORLD RICE (MILLED BASIS)

<u>Country</u>	----- Current Estimate MMT	1993/94 Monthly Change MMT	----- Monthly Change (%)	Change From 1992/93 (%)	<u>Comments</u>
World	346.7	-0.2	-0	-1	The 1993/94 crop is estimated lower this month as foreign production prospects are reduced.
United States	5.0	NC	NC	-13	No change this month.
Total Foreign	341.7	-0.2	-0	-1	Production is estimated lower due primarily to slight decreases in the FSU-12 and Uruguay.
FSU-12	1.3	-0.2	-12	+0	Production estimates for Russia, Turkmenistan, and Uzbekistan were reduced based on lower yield and recently released total grain statistics.

OILSEEDS

<u>Country</u>	<u>Current Estimate</u> MMT	<u>1993/94 Monthly Change</u> MMT	<u>1993/94 Monthly Change</u> (%)	<u>Change From 1992/93</u> (%)	<u>Comments</u>
World	223.7	+0.6	+0	-1	World oilseed production is forecast slightly higher this month due to increased estimates for soybeans, peanuts, and palm kernels.
United States	57.7	NC	NC	-16	No change this month. Production is below last year due to reduced output for peanuts, soybeans, and sunflowerseed.
Total Foreign	166.0	+0.6	+0	+5	Production is estimated higher due to increased soybean and peanut estimates for China and palm kernel revisions for Indonesia. However, sunflowerseed output in the FSU-12 and France is estimated lower, as well as cottonseed in China and India.

SOYBEANS

<u>Country</u>	<u>Current Estimate</u> MMT	<u>1993/94 Monthly Change</u> MMT	<u>1993/94 Monthly Change</u> (%)	<u>Change From 1992/93</u> (%)	<u>Comments</u>
World	113.1	+1.0	+1	-3	Production is estimated higher due to an increase in foreign output.
United States	49.2	NC	NC	-17	No change this month. Both area and output are down from last season due to wet conditions in the Midwest and drought in the Southeast.
Total Foreign	63.8	+1.0	+2	+12	Record production in China more than offsets minor reductions in Australia and Kazakhstan.
China	13.0	+1.0	+8	+26	Record production is estimated. Output is increased due to a larger harvested area, estimated at 9.3 million hectares. Growing conditions were slightly less favorable than last season, but still resulted in an above-average yield.

COTTONSEED

<u>Country</u>	----- Current Estimate MMT	1993/94 Monthly Change MMT	----- Monthly Change (%)	Change From 1992/93 (%)	<u>Comments</u>
World Total	30.2	-0.4	-1	-4	The 1993/94 crop is reduced this month as pest, disease, and unfavorable weather cut yields in China, India, Pakistan, and Australia.
United States	5.7	NC	NC	+1	Production is unchanged from last month. The 1993/94 cotton harvest is complete.
Total Foreign	24.6	-0.4	-2	-5	Production is estimated down from last month in China, India, and Pakistan, but up in Egypt.
China	6.7	-0.2	-3	-13	Yield is estimated lower in the North China Plain since losses from the bollworm infestation were more severe than earlier estimated.
India	4.5	-0.2	-3	-4	Yield is estimated lower in Punjab and Rajasthan as losses from pests were more severe than earlier estimated.
Pakistan	2.7	-0.1	-4	-12	Yield is estimated lower in the Punjab as a result of a severe white fly infestation and leaf curl virus.
Egypt	0.6	0.1	+30	+18	Yield is estimated higher due to the combination of favorable weather and effective pest control.

PEANUTS

<u>Country</u>	----- Current Estimate MMT	1993/94 Monthly Change MMT	----- Monthly Change (%)	Change From 1992/93 (%)	<u>Comments</u>
World	23.5	+0.5	+2	+2	The 1993/94 crop is estimated at a record due to production increases outside the United States.
United States	1.5	NC	NC	-22	No change this month. Harvested area and yield are estimated down from last year.
Total Foreign	22.0	+0.5	+2	+5	Record production is estimated, surpassing the old record set in 1989/90.
China	8.0	+0.5	+7	+34	Record production is forecast based on official estimates of the total oilseed harvest. Harvested area is estimated at just below the record set in 1985/86. Due to favorable weather, yield is estimated at a record 2.4 tons per hectare.

SUNFLOWERSEED

<u>Country</u>	----- Current Estimate MMT	1993/94 Monthly Change MMT	----- Monthly Change (%)	Change From 1992/93 (%)	<u>Comments</u>
World	20.9	-0.4	-2	-2	The 1993/94 crop is estimated down due to lower production estimates outside the United States.
United States	1.2	NC	NC	-0	No change this month.
Total Foreign	19.7	-0.4	-2	-3	Production is estimated down due primarily to unfavorable harvest reports from Russia and reduced yield estimates for France.
FSU-12	5.4	-0.3	-6	-5	Russian production is estimated lower as a result of recently released official harvest reports. In Kazakstan, poor harvest conditions reduced yield prospects.

RAPESEED

<u>Country</u>	----- Current Estimate MMT	1993/94 Monthly Change MMT	----- Monthly Change (%)	Change From 1992/93 (%)	<u>Comments</u>
World	27.0	-0.2	-1	+4	Production is estimated lower due to reductions outside the United States.
United States	0.1	NC	NC	+39	No change this month. Production for 1993/94 is up from last year due to a 40 percent increase in harvested area.
Total Foreign	26.9	-0.2	-1	+4	This month's production estimate is down due to reductions in Russia and Denmark.
FSU-12	0.3	-0.1	-24	-5	Russian production is lowered based on reduced area, while in Ukraine and Kazakhstan output is raised slightly. Newly-obtained historical oilseed data led to production revisions for the last 7 years.

COPRA

<u>Country</u>	<u>Current Estimate</u> MMT	<u>1993/94 Monthly Change</u> MMT	<u>Monthly Change</u> (%)	<u>Change From 1992/93</u> (%)	<u>Comments</u>
World	4.7	-0.2	-4	-2	Production is forecast down due to lowered expectations for Philippines copra.
Philippines	2.0	-0.2	-8	-5	Heavy winds and rain due to storms that have passed through coconut growing areas this season have lowered estimated yield.

PALM KERNEL

<u>Country</u>	<u>Current Estimate</u> MMT	<u>1993/94 Monthly Change</u> MMT	<u>Monthly Change</u> (%)	<u>Change From 1992/93</u> (%)	<u>Comments</u>
World	4.4	0.3	+8	+9	Record palm kernel output is forecast for 1993/94.
Indonesia	1.0	+0.3	+38	+19	Plans by the palm oil industry indicate an increase in palm kernal collection and consequently an increase in the palm kernal production forecast.

PALM OIL

<u>Country</u>	<u>Current Estimate</u> MMT	<u>1993/94 Monthly Change</u> MMT	<u>Monthly Change</u> (%)	<u>Change From 1992/93</u> (%)	<u>Comments</u>
World	13.8	NC	NC	+7	No change this month. Record production is forecast for 1993/94. Weather in Indonesia and Malaysia over the past 12 to 18 months replenished fruit-bearing potential after an extended period of below-normal rainfall.

COTTON

<u>Country</u>	----- Current Estimate MBALES	1993/94 Monthly Change MBALES	----- Monthly Change (%)	Change From 1992/93 (%)	<u>Comments</u>
World Total	79.2	-1.2	-1	-4	The 1993/94 crop is reduced this month as pest, disease, and unfavorable weather cut yields in China, India, Pakistan, and Australia.
United States	16.2	NC	NC	-0	Production is unchanged from last month. The 1993/94 harvest is complete.
Total Foreign	63.0	-1.2	-2	-5	Production is estimated down from last month in China, India, Pakistan, and Australia, but up in Egypt and Sudan.
China	18.0	-0.5	-3	-13	Yield is estimated lower in the North China Plain since losses from the bollworm infestation were more severe than earlier estimated.
India	10.5	-0.3	-3	-4	Yield is estimated lower in Punjab and Rajasthan as losses from pests were more severe than earlier estimated.
Pakistan	6.3	-0.3	-4	-12	Yield is estimated lower in the Punjab due to a severe white fly infestation and leaf curl virus.
Australia	1.3	-0.2	-13	-24	Area and yield are estimated lower owing to continued drought and the increased use of dryland varieties.
Egypt	1.9	0.2	+9	+14	Yield is estimated higher due to the combination of favorable weather and effective pest control.
Sudan	0.3	0.1	+43	+21	Yield is estimated higher owing to an excellent growing season.

TABLE 1

U.S. Crop Acreage, Yield, and Production 1/

COMMODITY	PLANTED AREA			HARVESTED AREA			YIELD					PRODUCTION			
	Prel.		Proj.	Prel.		Proj.	Prel.		1993/94 Proj.			Prel.		1993/94 Proj.	
	1991/92	1992/93	1993/94	1991/92	1992/93	1993/94	1991/92	1992/93	Jan.	Feb.		1991/92	1992/93	Jan.	Feb.
	--- Million acres ---			--- Million acres ---			--- Bushels per acre ---					--- Million bushels ---			
All Wheat	69.9	72.3	72.2	57.7	62.4	62.6	34.3	39.4	38.3	38.3		1,981	2,459	2,402	2,402
Winter	51.1	51.1	51.7	39.4	41.9	43.8	34.8	38.3	40.3	40.3		1,373	1,607	1,769	1,769
Other	18.8	21.2	20.5	18.3	20.5	18.8	33.2	41.6	33.6	33.6		608	852	633	633
Rye	1.7	1.6	1.5	0.4	0.4	0.4	24.6	29.4	27.1	27.1		10	12	10	10
Soybeans	59.2	59.1	59.4	58.0	58.2	56.4	34.2	37.6	32.0	32.0		1,987	2,188	1,809	1,809
Corn	76.0	79.3	73.3	68.8	72.2	63.0	108.6	131.4	100.7	100.7		7,475	9,482	6,344	6,344
Sorghum	11.1	13.3	10.5	9.9	12.2	9.5	59.3	72.8	59.9	59.9		585	884	568	568
Barley	8.9	7.8	7.8	8.4	7.3	6.8	55.2	62.5	58.9	58.9		464	458	400	400
Oats	8.7	8.0	7.9	4.8	4.5	3.8	50.7	65.6	54.4	54.4		243	295	206	206
							--- Pounds per acre ---					--- Million CWT ---			
Rice	2.9	3.2	2.9	2.8	3.1	2.8	5,674	5,736	5,510	5,510		157.5	179.7	156.1	156.1
												--- Million 480-pound bales ---			
All Cotton	14.1	13.2	13.4	13.0	11.1	12.8	652	699	607	607		17.6	16.2	16.2	16.2

1/ All estimates are from the USDA National Agricultural Statistics Service (NASS) and are published in the Crop Production circular from NASS.

February 1994

Production Estimates & Crop Assessment Division, FAS, USDA

TABLE 2
World Crop Production Summary

Commodity	World	North America		Europe		FSU -12	Asia				South America		Selected Other		All Others					
		United States		Canada	Mexico		European Union	Oth. Europe	W. Europe	Eastern Europe	China	India	Indo - nesia	Paki - stan		Thai - land	Argen - tina	Brazil	Aus - tralia	South Turkey
		States																		
--- Million metric tons ---																				
<u>Wheat</u> 1991/92 1992/93 prel. 1993/94 proj. Jan. Feb.	542.5	488.6	53.9	31.9	3.7	90.4	4.1	38.5	70.9	96.0	55.1	0.0	14.6	0.0	9.9	3.1	10.6	2.1	16.5	41.2
	560.3	493.4	66.9	29.9	3.0	84.9	3.7	26.4	88.2	101.6	55.1	0.0	15.7	0.0	9.7	2.7	16.2	1.3	15.5	39.5
	559.6	494.2	65.4	27.8	2.8	80.7	4.0	30.5	83.4	105.0	56.5	0.0	16.2	0.0	9.5	2.0	17.3	1.9	16.8	39.8
	562.4	497.0	65.4	27.8	2.8	80.6	4.0	30.5	85.6	105.0	56.5	0.0	16.2	0.0	9.5	2.1	18.0	1.9	16.8	39.8
<u>Coarse Grains</u> 1991/92 1992/93 prel. 1993/94 proj. Jan. Feb.	803.4	584.8	218.6	21.8	17.6	89.7	12.5	64.7	76.2	112.3	26.3	5.4	1.6	3.8	14.5	31.4	8.0	3.4	9.6	86.0
	855.7	577.9	277.9	19.5	18.0	82.5	9.4	41.9	92.8	108.4	36.8	5.6	1.6	3.6	14.3	28.7	8.3	10.1	9.1	87.5
	779.9	592.4	187.5	24.5	18.5	82.9	11.4	42.8	92.9	116.0	34.7	5.7	1.7	3.1	14.1	28.2	9.2	10.1	10.1	86.7
	776.6	589.1	187.5	24.5	18.5	82.4	11.4	43.0	88.2	116.0	34.7	5.7	1.7	3.1	14.1	28.2	9.6	11.1	10.1	86.9
<u>Rice (Milled)</u> 1991/92 1992/93 prel. 1993/94 proj. Jan. Feb.	348.3	343.2	5.0	0.0	0.2	1.5	0.0	0.1	1.3	128.7	73.7	29.0	3.2	13.5	0.4	6.9	0.7	0.0	0.1	84.0
	351.3	345.6	5.7	0.0	0.2	1.4	0.0	0.1	1.3	130.4	72.5	30.7	3.1	13.2	0.4	6.7	0.6	0.0	0.1	84.9
	346.9	342.0	5.0	0.0	0.1	1.3	0.0	0.1	1.5	127.4	73.5	31.3	3.6	12.2	0.3	6.6	0.7	0.0	0.1	83.2
	346.7	341.7	5.0	0.0	0.1	1.3	0.9	0.1	1.3	127.4	73.5	31.3	3.6	12.2	0.3	6.6	0.7	0.0	0.1	83.2
<u>Total Grains 1/</u> 1991/92 1992/93 prel. 1993/94 proj. Jan. Feb.	1,694.2	1,416.6	277.6	53.7	21.5	181.6	16.7	103.2	148.4	336.9	155.1	34.4	19.4	17.2	24.8	41.4	19.3	5.6	26.2	211.2
	1,767.4	1,416.9	350.5	49.4	21.2	168.8	13.1	68.4	182.3	340.3	164.3	36.3	20.4	16.7	24.3	38.1	25.1	11.4	24.8	212.0
	1,686.4	1,402.5	283.9	52.3	21.5	165.0	15.4	73.3	177.7	350.5	164.2	36.4	20.9	16.2	23.9	37.3	27.2	12.0	27.1	181.6
	1,685.7	1,427.8	257.9	52.3	21.4	164.2	15.4	73.6	175.1	348.4	164.7	37.0	21.5	15.3	23.9	36.8	28.3	13.0	27.1	209.8
<u>Oilseeds 2/</u> 1991/92 1992/93 prel. 1993/94 proj. Jan. Feb.	223.3	159.0	64.3	5.8	1.3	13.1	0.7	4.4	11.2	34.2	20.8	4.4	4.8	0.8	15.9	20.7	1.1	0.4	1.7	17.8
	226.9	158.5	68.4	5.2	1.0	12.0	0.7	4.1	10.3	32.7	23.5	4.6	3.5	0.7	14.7	23.2	0.9	0.6	2.0	18.8
	223.1	165.4	57.7	7.3	0.9	11.1	0.7	3.6	10.5	34.4	24.3	4.6	3.3	0.7	16.2	24.8	1.1	0.7	1.9	19.4
	223.7	166.0	57.7	7.3	0.9	10.9	0.7	3.7	10.1	35.7	24.1	4.9	3.1	0.7	16.2	24.8	1.0	0.7	1.9	19.3
--- Million 480-pound bales ---																				
<u>Cotton</u> 1991/92 1992/93 prel. 1993/94 proj. Jan. Feb.	96.0	78.4	17.6	0.0	0.8	1.4	0.0	0.1	6.8	26.1	9.4	0.0	10.0	0.2	1.1	3.4	2.3	0.1	2.6	14.0
	82.8	66.5	16.2	0.0	0.1	1.5	0.0	0.1	6.0	20.7	10.9	0.0	7.1	0.1	0.6	2.1	1.7	0.1	2.6	12.8
	80.3	64.2	16.2	0.0	0.1	1.6	0.0	0.1	6.3	18.5	10.8	0.0	6.5	0.1	1.1	2.1	1.5	0.1	2.4	13.1
	79.2	63.0	16.2	0.0	0.1	1.6	0.0	0.1	6.3	18.0	10.5	0.0	6.3	0.0	1.1	2.1	1.3	0.1	2.4	13.2

1/ Includes wheat, coarse grains, and rice (milled) shown above.

2/ Includes soybean, cottonseed, peanut (in-shell), sunflowerseed, rapeseed, copra, and palm kernel.

Note: Entries of 0.0 indicate no reported or insignificant production.

TABLE 3
Wheat Area, Yield, and Production
World and Selected Countries and Regions

Country/Region	Area				Yield				Production				Change in Production			
	Prel.		1993/94 Proj.		Prel.		1993/94 Proj.		Prel.		1993/94 Proj.		From last month		From last year	
	1991/92	1992/93	Jan.	Feb.	1991/92	1992/93	Jan.	Feb.	1991/92	1992/93	Jan.	Feb.	MMT	Percent	MMT	Percent
	Million hectares				Metric tons per hectare				Million metric tons				MMT	Percent	MMT	Percent
World	222.25	222.41	222.48	222.98	2.44	2.52	2.52	2.52	542.51	560.34	559.58	562.40	2.82	0.50	2.06	0.37
United States	23.35	25.26	25.35	25.35	2.31	2.65	2.58	2.58	53.92	66.92	65.37	65.37	0.00	0.00	-1.55	-2.31
Total Foreign	198.90	197.15	197.12	197.63	2.46	2.50	2.51	2.51	488.59	493.42	494.21	497.03	2.82	0.57	3.61	0.73
Major Exporters																
European Union	42.77	44.24	42.55	42.51	3.34	3.18	3.18	3.20	142.81	140.68	135.29	135.88	0.59	0.44	-4.80	-3.41
France	16.88	16.91	15.65	15.61	5.36	5.02	5.16	5.16	90.42	84.93	80.69	80.58	-0.11	-0.14	-4.35	-5.12
United Kingdom	5.20	5.12	4.60	4.60	6.65	6.40	6.45	6.46	34.59	32.78	29.66	29.70	0.04	0.13	-3.08	-9.39
Germany	1.98	2.06	1.83	1.80	7.27	6.80	7.12	7.22	14.40	14.00	13.00	13.00	0.00	0.00	-1.00	-7.14
Canada	2.45	2.60	2.40	2.40	6.77	5.98	6.57	6.57	16.61	15.54	15.74	15.74	0.00	0.00	0.20	1.27
Australia	14.16	13.83	12.60	12.60	2.26	2.16	2.21	2.21	31.95	29.87	27.80	27.80	0.00	0.00	-2.07	-6.93
Argentina	7.18	9.10	9.50	9.50	1.47	1.78	1.82	1.89	10.56	16.18	17.30	18.00	0.70	4.05	1.82	11.22
	4.55	4.40	4.80	4.80	2.17	2.20	1.98	1.98	9.88	9.70	9.50	9.50	0.00	0.00	-0.20	-2.06
Major Importers																
China	91.52	89.98	89.27	89.82	2.34	2.46	2.51	2.52	214.48	221.71	223.73	225.96	2.24	1.00	4.25	1.92
FSU-12	30.95	30.50	30.50	30.20	3.10	3.33	3.44	3.48	96.00	101.59	105.00	105.00	0.00	0.00	3.41	3.36
Russia	45.56	46.67	44.89	45.65	1.56	1.89	1.86	1.88	70.88	88.21	83.43	85.62	2.18	2.62	-2.59	-2.94
Ukraine	23.15	24.40	24.00	24.77	1.68	1.89	1.88	1.84	38.90	46.20	45.00	45.50	0.50	1.11	-0.70	-1.52
Kazakhstan	7.02	6.33	5.76	5.76	3.01	3.08	3.65	3.79	21.16	19.51	21.03	21.83	0.81	3.83	2.32	11.90
Baltic States	13.46	13.88	12.80	12.74	0.51	1.32	0.98	1.04	6.89	18.29	12.50	13.20	0.70	5.60	-5.09	-27.81
Eastern Europe	0.37	0.43	0.48	0.48	2.99	2.76	2.68	2.68	1.10	1.19	1.28	1.28	0.00	0.00	0.08	6.78
Poland	9.86	8.15	9.70	9.59	3.90	3.24	3.14	3.18	38.48	26.42	30.50	30.50	0.00	0.00	4.08	15.44
Romania	2.44	2.41	2.50	2.50	3.80	3.06	3.32	3.32	9.27	7.37	8.30	8.30	0.00	0.00	0.93	12.65
Egypt	2.18	1.48	2.20	2.30	2.52	2.07	2.41	2.30	5.49	3.05	5.30	5.30	0.00	0.00	2.25	73.88
Morocco	0.76	0.88	0.88	0.88	5.90	5.26	5.51	5.51	4.48	4.62	4.85	4.85	0.00	0.00	0.23	5.05
Brazil	2.64	2.23	2.31	2.31	1.87	0.70	0.66	0.66	4.94	1.56	1.52	1.52	0.00	0.00	-0.04	-2.69
	2.15	2.00	1.40	1.60	1.43	1.37	1.43	1.28	3.08	2.74	2.00	2.05	0.05	2.50	-0.69	-25.16
Other Foreign	64.61	62.94	65.30	65.30	2.03	2.08	2.07	2.07	131.31	131.03	135.20	135.19	-0.01	-0.01	4.16	3.18
India	24.17	22.98	24.50	24.50	2.28	2.40	2.31	2.31	55.13	55.09	56.50	56.50	0.00	0.00	1.41	2.56
Turkey	8.80	8.80	8.90	8.90	1.88	1.76	1.89	1.89	16.50	15.50	16.80	16.80	0.00	0.00	1.30	8.39
Pakistan	7.91	7.85	8.24	8.24	1.84	2.00	1.97	1.97	14.57	15.68	16.20	16.20	0.00	0.00	0.52	3.29
Mexico	0.88	0.73	0.65	0.65	4.20	4.14	4.31	4.31	3.70	3.00	2.80	2.80	0.00	0.00	-0.20	-6.67
Saudi Arabia	0.74	0.74	0.68	0.68	5.22	5.54	5.51	5.51	3.86	4.10	3.75	3.75	0.00	0.00	-0.35	-8.54
Rep. of South Africa	1.43	0.74	1.07	1.07	1.49	1.77	1.78	1.78	2.13	1.32	1.90	1.90	0.00	0.00	0.58	44.16
Others	20.68	21.10	21.27	21.27	1.71	1.72	1.75	1.75	35.42	36.34	37.25	37.24	-0.01	-0.02	0.91	2.49

TABLE 4

Total Coarse Grain Area, Yield, and Production

World and Selected Countries and Regions

Country/Region	Area				Yield				Production				Change in Production			
	Prel.				Prel.				Prel.				From last month			
	1991/92	1992/93	Jan.	Feb.	1991/92	1992/93	Jan.	Feb.	1991/92	1992/93	Jan.	Feb.	MMT	Percent	MMT	Percent
	Million hectares				Metric tons per hectare				Million metric tons							
World	317.80	317.48	311.48	310.99	2.53	2.70	2.50	2.50	803.43	855.72	779.93	776.60	-3.32	-0.43	-79.12	-9.25
United States	37.37	39.07	33.77	33.77	5.85	7.11	5.55	5.55	218.63	277.85	187.54	187.54	0.00	0.00	-90.31	-32.50
Total Foreign	280.43	278.41	277.71	277.22	2.09	2.08	2.13	2.12	584.79	577.87	592.39	589.06	-3.32	-0.56	11.19	1.94
Major Exporters	20.63	20.41	21.65	21.75	2.49	2.73	2.82	2.87	51.42	55.69	60.97	62.34	1.38	2.26	6.66	11.95
Canada	6.59	6.22	6.95	6.95	3.30	3.13	3.53	3.53	21.78	19.49	24.50	24.50	0.00	0.00	5.01	25.68
Argentina	3.80	3.88	3.88	3.88	3.80	3.68	3.64	3.64	14.45	14.26	14.11	14.11	0.00	0.00	-0.15	-1.05
Australia	4.61	4.60	5.29	5.29	1.74	1.80	1.74	1.81	8.00	8.29	9.21	9.58	0.38	4.07	1.29	15.57
South Africa, Rep.	4.14	4.34	4.29	4.39	0.83	2.33	2.35	2.53	3.44	10.09	10.07	11.07	1.00	9.93	0.98	9.71
Thailand	1.49	1.37	1.25	1.25	2.52	2.59	2.46	2.46	3.75	3.55	3.08	3.08	0.00	0.00	-0.47	-13.24
Major Importers	101.02	99.76	98.20	98.16	2.62	2.48	2.56	2.51	264.97	247.29	251.46	246.46	-5.00	-1.99	-0.83	-0.34
FSU-12	52.18	51.30	52.27	51.65	1.46	1.81	1.78	1.71	76.20	92.76	92.88	88.18	-4.70	-5.06	-4.58	-4.94
Russia	33.50	33.29	32.60	32.14	1.38	1.67	1.61	1.56	46.18	55.73	52.40	50.20	-2.20	-4.20	-5.53	-9.92
Ukraine	5.83	5.81	6.35	6.35	2.58	2.68	3.04	2.98	15.06	15.59	19.30	18.93	-0.38	-1.94	3.34	21.43
Kazakhstan	8.66	7.93	8.89	8.76	0.50	1.33	1.02	0.87	4.36	10.58	9.10	7.59	-1.52	-16.65	-2.99	-28.29
Baltic States	1.69	1.77	1.58	1.58	2.50	1.55	1.97	1.94	4.23	2.73	3.11	3.06	-0.05	-1.61	0.33	12.01
European Union	18.92	18.11	16.92	16.93	4.74	4.55	4.90	4.87	89.70	82.48	82.87	82.36	-0.51	-0.62	-0.11	-0.13
Germany	4.11	3.92	3.84	3.84	5.52	4.91	5.09	5.09	22.66	19.22	19.55	19.55	0.00	0.00	0.33	1.74
France	3.98	4.16	3.84	3.89	6.48	6.68	6.65	6.64	25.80	27.78	25.57	25.87	0.30	1.17	-1.91	-6.87
Eastern Europe	16.53	16.75	15.78	16.36	3.91	2.50	2.71	2.63	64.69	41.93	42.79	43.04	0.26	0.60	1.12	2.67
Poland	6.28	5.92	6.10	6.10	2.95	2.13	2.49	2.49	18.54	12.59	15.20	15.20	0.00	0.00	2.61	20.69
Romania	3.85	4.31	3.68	4.04	3.58	1.83	2.42	2.27	13.78	7.90	8.90	9.15	0.25	2.81	1.25	15.84
Czechoslovakia	1.17	1.25	1.25	1.25	4.67	3.89	3.58	3.58	5.48	4.84	4.48	4.48	0.00	0.00	-0.37	-7.54
Mexico	8.84	9.14	9.05	9.05	1.99	1.96	2.04	2.04	17.63	17.95	18.45	18.45	0.00	0.00	0.50	2.79
Other W. Europe	2.86	2.70	2.61	2.61	4.37	3.49	4.36	4.36	12.52	9.44	11.36	11.36	0.00	0.00	1.92	20.29
Other Foreign	158.78	158.24	157.86	157.31	1.69	1.74	1.77	1.78	268.40	274.90	279.96	280.26	0.30	0.11	5.37	1.95
China	26.94	26.00	26.27	25.72	4.17	4.17	4.42	4.51	112.28	108.36	116.04	116.04	0.00	0.00	7.68	7.09
India	33.77	35.33	35.39	35.39	0.78	1.04	0.98	0.98	26.28	36.75	34.70	34.70	0.00	0.00	-2.05	-5.58
Brazil	14.51	12.78	12.97	12.97	2.17	2.24	2.17	2.17	31.43	28.66	28.20	28.20	0.00	0.00	-0.46	-1.61
Turkey	4.45	4.48	4.55	4.55	2.17	2.04	2.23	2.23	9.65	9.15	10.14	10.14	0.00	0.00	0.99	10.83
Indonesia	2.90	3.00	3.05	3.05	1.86	1.87	1.85	1.85	5.40	5.60	5.65	5.65	0.00	0.00	0.05	0.89
Philippines	3.48	3.33	3.10	3.10	1.29	1.43	1.45	1.45	4.49	4.75	4.50	4.50	0.00	0.00	-0.25	-5.28
Others	72.73	73.33	72.55	72.55	1.08	1.11	1.11	1.12	78.87	81.64	80.74	81.04	0.30	0.37	-0.59	-0.73

TABLE 5
Corn Area, Yield, and Production
World and Selected Countries and Regions

Country/Region	Area				Yield				Production				Change in Production			
	Prel.		1993/94 Proj.		Prel.		1993/94 Proj.		Prel.		1993/94 Proj.		From last month		From last year	
	1991/92	1992/93	Jan.	Feb.	1991/92	1992/93	Jan.	Feb.	1991/92	1992/93	Jan.	Feb.	MMT	Percent	MMT	Percent
	Million hectares				Metric tons per hectare				Million metric tons							
World	131.07	131.91	127.05	127.31	3.72	4.01	3.59	3.59	487.20	528.60	456.36	457.51	1.14	0.25	-71.10	-13.45
United States	27.86	29.20	25.49	25.49	6.82	8.25	6.32	6.32	189.89	240.85	161.15	161.15	0.00	0.00	-79.70	-33.09
Total Foreign	103.21	102.70	101.55	101.82	2.88	2.80	2.91	2.91	297.32	287.76	295.22	296.36	1.14	0.39	8.60	2.99
Major Exporters	7.20	7.30	7.20	7.30	2.41	3.15	3.18	3.27	17.33	23.00	22.90	23.90	1.00	4.37	0.90	3.91
Argentina	2.40	2.45	2.50	2.50	4.42	4.16	4.20	4.20	10.60	10.20	10.50	10.50	0.00	0.00	0.30	2.94
South Africa	3.45	3.62	3.60	3.70	0.91	2.60	2.64	2.84	3.13	9.40	9.50	10.50	1.00	10.53	1.10	11.70
Thailand	1.35	1.23	1.10	1.10	2.67	2.76	2.64	2.64	3.60	3.40	2.90	2.90	0.00	0.00	-0.50	-14.71
Major Importers	21.50	22.55	21.06	21.63	4.06	3.27	3.52	3.43	87.21	73.66	74.07	74.24	0.17	0.23	0.58	0.79
Eastern Europe	6.66	7.64	6.44	6.95	5.10	2.58	2.94	2.73	33.97	19.73	18.95	18.95	0.00	0.00	-0.78	-3.93
Romania	2.58	3.34	2.70	3.00	4.08	1.80	2.59	2.33	10.50	6.01	7.00	7.00	0.00	0.00	0.99	16.41
Yugoslavia	2.10	2.20	2.00	2.00	5.48	3.02	3.00	3.00	11.50	6.65	6.00	6.00	0.00	0.00	-0.65	-9.77
European Union	3.85	3.75	3.60	3.65	6.94	7.84	7.92	7.90	26.71	29.36	28.49	28.79	0.30	1.05	-0.57	-1.96
France	1.77	1.86	1.80	1.85	7.29	7.98	8.11	8.05	12.93	14.87	14.60	14.90	0.30	2.05	0.03	0.19
Italy	0.86	0.88	0.96	0.96	7.26	8.70	8.33	8.33	6.24	7.68	8.00	8.00	0.00	0.00	0.32	4.18
Mexico	7.70	8.10	8.10	8.10	1.88	1.91	1.98	1.98	14.50	15.50	16.00	16.00	0.00	0.00	0.50	3.23
FSU-12	2.98	2.77	2.63	2.64	3.27	2.62	3.26	3.20	9.76	7.25	8.58	8.45	-0.13	-1.52	1.19	16.43
Russia	0.73	0.80	0.70	0.70	2.69	2.64	3.14	3.14	1.97	2.10	2.20	2.20	0.00	0.00	0.10	4.76
Ukraine	1.46	1.16	1.10	1.10	3.25	2.46	3.18	3.18	4.75	2.85	3.50	3.50	0.00	0.00	0.65	22.76
Other W. Europe	0.22	0.20	0.20	0.20	8.41	6.63	7.94	7.94	1.81	1.34	1.58	1.58	0.00	0.00	0.24	17.91
Others	0.10	0.10	0.10	0.10	4.67	4.89	4.92	4.92	0.47	0.47	0.47	0.47	0.00	0.00	-0.00	-0.42
Other Foreign	74.50	72.85	73.29	72.89	2.59	2.62	2.70	2.72	192.78	191.10	198.25	198.23	-0.03	-0.01	7.12	3.73
China	21.57	21.04	21.00	20.60	4.58	4.53	4.86	4.95	98.77	95.38	102.00	102.00	0.00	0.00	6.62	6.94
Brazil	14.03	12.35	12.50	12.50	2.20	2.27	2.20	2.20	30.80	28.00	27.50	27.50	0.00	0.00	-0.50	-1.79
India	5.78	6.07	5.90	5.90	1.38	1.70	1.61	1.61	7.98	10.30	9.50	9.50	0.00	0.00	-0.80	-7.77
Canada	1.11	0.86	0.99	0.99	6.71	5.70	6.67	6.67	7.41	4.88	6.60	6.60	0.00	0.00	1.72	35.16
Indonesia	2.90	3.00	3.05	3.05	1.86	1.87	1.85	1.85	5.40	5.60	5.65	5.65	0.00	0.00	0.05	0.89
Philippines	3.48	3.33	3.10	3.10	1.29	1.43	1.45	1.45	4.49	4.75	4.50	4.50	0.00	0.00	-0.25	-5.28
Egypt	0.69	0.75	0.77	0.77	6.39	6.00	6.10	6.10	4.43	4.50	4.70	4.70	0.00	0.00	0.20	4.44
Zimbabwe	0.88	1.20	1.40	1.40	0.59	2.00	1.79	1.79	0.52	2.40	2.50	2.50	0.00	0.00	0.10	4.17
Others	24.05	24.25	24.58	24.58	1.37	1.46	1.44	1.43	32.98	35.29	35.30	35.28	-0.03	-0.07	-0.01	-0.03

TABLE 6
Barley Area, Yield, and Production
World and Selected Countries and Regions

Country/Region	Area			Yield			Production			Change in Production		
	Prel.			Prel.			Prel.			From last month		
	1991/92	1992/93	1993/94 Proj.	1991/92	1992/93	1993/94 Proj.	1991/92	1992/93	1993/94 Proj.	From last month	From last year	
	Million hectares			Metric tons per hectare			Million metric tons			MMT	Percent	MMT
World	76.00	72.62	73.39	2.22	2.27	2.29	169.08	165.17	167.75	-2.30	-1.37	0.27
United States	3.41	2.96	2.75	2.97	3.36	3.17	10.11	9.97	8.71	0.00	0.00	-1.26
Total Foreign	72.59	69.65	70.64	2.19	2.23	2.25	158.97	155.20	159.03	-2.30	-1.45	1.53
European Union	12.03	11.43	10.37	4.28	3.78	4.16	51.53	43.15	43.17	-0.75	-1.74	-0.73
Denmark	0.94	0.89	0.75	5.34	3.33	5.47	5.04	2.97	4.10	-0.70	-17.07	0.43
France	1.74	1.80	1.60	6.19	5.88	5.55	10.79	10.58	8.88	0.00	0.00	-1.70
Germany	2.54	2.41	2.21	5.72	5.06	5.02	14.49	12.20	11.10	0.00	0.00	-1.10
Italy	0.47	0.45	0.40	3.80	3.87	3.75	1.79	1.74	1.50	0.00	0.00	-0.24
Spain	4.37	4.01	3.70	2.09	1.49	2.43	9.14	5.99	9.00	0.00	0.00	3.01
United Kingdom	1.39	1.31	1.20	5.54	5.61	5.25	7.70	7.35	6.30	-0.05	-0.79	-1.10
FSU-12	27.44	25.98	28.20	1.40	1.97	1.81	38.43	51.21	50.96	-2.35	-4.62	-2.61
Russia	15.28	14.53	14.70	1.45	1.86	1.67	22.17	27.00	24.50	0.20	0.82	-2.30
Ukraine	3.19	3.45	4.05	2.52	2.93	3.28	8.05	10.11	13.30	-0.73	-5.45	2.47
Kazakhstan	6.61	5.72	7.06	0.47	1.49	1.01	3.09	8.51	7.10	-1.61	-22.75	-3.03
Baltic States	1.21	1.24	0.99	2.56	1.45	2.03	3.09	1.80	2.00	0.00	0.00	0.19
Eastern Europe	4.05	3.67	3.59	3.67	3.02	2.90	14.83	11.11	10.43	0.25	2.40	-0.43
Poland	1.24	1.20	1.20	3.44	2.35	2.75	4.26	2.82	3.30	0.00	0.00	0.48
Czechoslovakia	0.79	0.89	0.88	4.79	4.00	3.62	3.79	3.55	3.20	0.00	0.00	-0.35
Romania	1.02	0.63	0.60	2.89	2.14	2.42	2.95	1.35	1.30	0.25	19.23	0.20
Canada	4.22	3.79	4.20	2.75	2.88	3.17	11.62	10.92	13.30	0.00	0.00	2.38
Other W. Europe	1.54	1.42	1.35	4.19	3.47	4.05	6.43	4.92	5.47	0.00	0.00	0.54
Sweden	0.46	0.43	0.39	4.21	2.92	4.49	1.94	1.26	1.75	0.00	0.00	0.49
Turkey	3.40	3.43	3.50	2.00	1.84	2.06	6.80	6.30	7.20	0.00	0.00	0.90
Australia	2.74	2.90	3.50	1.65	1.92	1.83	4.53	5.56	6.40	0.25	3.91	1.09
China	1.20	1.25	1.23	3.27	3.20	3.43	3.93	4.00	4.20	0.00	0.00	0.20
Morocco	2.36	2.23	1.50	1.38	0.48	0.68	3.25	1.08	1.02	0.00	0.00	-0.06
India	0.96	0.94	0.99	1.70	1.75	1.73	1.63	1.65	1.70	0.00	0.00	0.05
Others	11.46	11.37	11.23	1.13	1.19	1.18	12.91	13.51	13.20	0.30	2.27	-0.01

TABLE 7
Oats Area, Yield, and Production
World and Selected Countries and Regions

Country/Region	Area				Yield				Production				Change in Production			
	Prel.		1993/94 Proj.		Prel.		1993/94 Proj.		Prel.		1993/94 Proj.		From last month		From last year	
	1991/92	1992/93	Jan.	Feb.	1991/92	1992/93	Jan.	Feb.	1991/92	1992/93	Jan.	Feb.	MMT	Percent	MMT	Percent
	Million hectares				Metric tons per hectare				Million metric tons				MMT	Percent	MMT	Percent
World	20.08	19.56	20.02	19.46	1.63	1.72	1.72	1.76	32.78	33.69	34.41	34.15	-0.26	-0.76	0.47	1.39
United States	1.95	1.82	1.54	1.54	1.82	2.35	1.95	1.95	3.53	4.28	2.99	2.99	0.00	0.00	-1.28	-30.01
Total Foreign	18.14	17.74	18.48	17.92	1.61	1.66	1.70	1.74	29.25	29.41	31.42	31.16	-0.26	-0.83	1.75	5.96
FSU-12	10.43	9.83	10.42	9.84	1.18	1.42	1.32	1.35	12.34	14.01	13.73	13.32	-0.41	-2.99	-0.69	-4.90
Russia	9.03	8.50	9.00	8.42	1.15	1.32	1.22	1.25	10.37	11.20	11.00	10.50	-0.50	-4.55	-0.70	-6.25
Ukraine	0.50	0.50	0.50	0.50	1.90	2.52	2.40	2.60	0.95	1.25	1.20	1.30	0.10	8.33	0.05	4.33
Belarus	0.36	0.36	0.36	0.36	2.11	2.22	2.50	2.22	0.76	0.80	0.90	0.80	-0.10	-11.11	0.00	0.00
Baltic States	0.22	0.17	0.20	0.20	2.39	1.26	1.88	1.88	0.52	0.22	0.38	0.38	0.00	0.00	0.16	73.61
Maj. Foreign Exporters	2.70	3.07	3.06	3.06	1.97	1.96	2.25	2.30	5.31	6.03	6.90	7.05	0.15	2.17	1.02	16.93
Canada	0.84	1.24	1.35	1.35	2.13	2.28	2.67	2.67	1.79	2.82	3.60	3.60	0.00	0.00	0.78	27.52
Sweden	0.35	0.34	0.30	0.30	4.13	2.36	4.50	4.50	1.43	0.81	1.35	1.35	0.00	0.00	0.54	67.29
Australia	1.16	1.14	1.06	1.06	1.46	1.71	1.42	1.56	1.69	1.95	1.50	1.65	0.15	10.00	-0.30	-15.34
Argentina	0.35	0.35	0.35	0.35	1.14	1.29	1.29	1.29	0.40	0.45	0.45	0.45	0.00	0.00	0.00	0.00
Other Foreign	4.80	4.67	4.80	4.82	2.31	1.96	2.17	2.16	11.08	9.15	10.41	10.41	-0.00	-0.00	1.26	13.74
China	0.55	0.54	0.54	0.54	1.18	1.19	1.19	1.19	0.65	0.64	0.64	0.64	0.00	0.00	0.00	0.00
European Union	1.32	1.24	1.26	1.26	3.33	2.88	3.26	3.26	4.38	3.58	4.11	4.11	0.00	0.00	0.54	14.99
France	0.18	0.17	0.15	0.15	4.23	4.24	4.48	4.48	0.74	0.70	0.65	0.65	0.00	0.00	-0.05	-7.14
Germany	0.38	0.36	0.36	0.36	4.91	3.67	4.72	4.72	1.87	1.31	1.70	1.70	0.00	0.00	0.39	29.38
Italy	0.15	0.15	0.14	0.14	2.46	2.28	2.29	2.29	0.36	0.33	0.32	0.32	0.00	0.00	-0.01	-3.90
United Kingdom	0.10	0.11	0.10	0.10	5.24	5.00	5.00	5.00	0.55	0.53	0.50	0.50	0.00	0.00	-0.02	-4.76
Eastern Europe	1.20	1.20	1.35	1.37	2.43	1.86	2.01	1.98	2.92	2.22	2.71	2.71	0.00	0.00	0.48	21.74
Czechoslovakia	0.09	0.09	0.09	0.09	3.89	3.00	3.24	3.24	0.35	0.26	0.28	0.28	0.00	0.00	0.02	7.84
Poland	0.69	0.67	0.70	0.70	2.73	1.84	2.14	2.14	1.87	1.23	1.50	1.50	0.00	0.00	0.27	22.05
Yugoslavia	0.13	0.05	0.13	0.13	1.92	1.80	1.77	1.77	0.25	0.09	0.23	0.23	0.00	0.00	0.14	155.56
Finland	0.34	0.33	0.33	0.33	3.37	3.20	3.64	3.64	1.16	1.06	1.20	1.20	0.00	0.00	0.14	13.42
Norway	0.13	0.13	0.12	0.12	4.20	2.39	3.75	3.75	0.54	0.32	0.45	0.45	0.00	0.00	0.13	41.51
Turkey	0.15	0.15	0.15	0.15	1.87	1.87	1.93	1.93	0.28	0.28	0.28	0.28	0.00	0.00	0.00	0.00
Others	1.11	1.07	1.06	1.06	1.04	0.99	0.97	0.97	1.16	1.06	1.03	1.03	-0.00	-0.00	-0.03	-3.30

TABLE 8
Rye Area, Yield, and Production
World and Selected Countries and Regions

Country/Region	Area				Yield				Production				Change in Production			
	Prel.				Prel.				Prel.				From last month			
	1991/92	1992/93	Jan.	Feb.	1991/92	1992/93	Jan.	Feb.	1991/92	1992/93	Jan.	Feb.	From last month	From last year	From last year	From last year
	Million hectares				Metric tons per hectare				Million metric tons				MMT	Percent	MMT	Percent
World	13.14	14.04	13.07	12.68	2.08	2.00	2.17	2.12	27.36	28.05	28.39	26.93	-1.46	-5.13	-1.12	-4.00
United States	0.16	0.16	0.15	0.15	1.55	1.85	1.71	1.71	0.25	0.30	0.26	0.26	0.00	0.00	-0.04	-13.49
Total Foreign	12.98	13.87	12.91	12.53	2.09	2.00	2.18	2.13	27.11	27.75	28.12	26.67	-1.46	-5.17	-1.08	-3.90
FSU-12	8.30	9.63	8.41	8.01	1.69	1.88	1.98	1.91	14.06	18.09	16.61	15.26	-1.35	-8.13	-2.83	-15.64
Russia	6.46	7.60	6.40	6.07	1.64	1.83	1.95	1.81	10.62	13.90	12.50	11.00	-1.50	-12.00	-2.90	-20.86
Ukraine	0.49	0.50	0.50	0.50	2.00	2.32	2.00	2.40	0.98	1.16	1.00	1.20	0.20	20.00	0.04	3.81
Belarus	0.78	0.90	0.90	0.90	2.51	2.78	2.78	2.78	1.96	2.50	2.50	2.50	0.00	0.00	0.00	0.00
Baltic States	0.27	0.36	0.39	0.39	2.32	2.01	1.90	1.77	0.62	0.71	0.74	0.69	-0.05	-6.76	-0.02	-3.09
Major Exporter																
Canada	0.18	0.14	0.16	0.16	1.87	1.92	1.88	1.88	0.34	0.27	0.30	0.30	0.00	0.00	0.04	13.21
Other Foreign																
Eastern Europe	4.23	3.75	3.96	3.97	2.86	2.31	2.65	2.62	12.09	8.68	10.47	10.41	-0.06	-0.53	1.73	19.99
Hungary	2.62	2.27	2.46	2.46	2.60	1.98	2.26	2.26	6.80	4.51	5.55	5.56	0.01	0.09	1.05	23.28
Poland	0.09	0.07	0.07	0.07	2.38	2.00	1.57	1.57	0.22	0.14	0.11	0.11	0.00	0.00	-0.03	-21.43
Czechoslovakia	2.29	2.03	2.20	2.20	2.58	1.96	2.27	2.27	5.90	3.98	5.00	5.00	0.00	0.00	1.02	25.60
European Union	0.13	0.09	0.10	0.10	3.81	2.90	3.00	3.00	0.48	0.26	0.30	0.30	0.00	0.00	0.05	17.65
Denmark	1.18	1.06	1.07	1.08	3.74	3.18	3.73	3.64	4.40	3.38	3.98	3.92	-0.06	-1.51	0.55	16.16
France	0.08	0.09	0.07	0.08	4.94	3.50	5.71	4.25	0.40	0.31	0.40	0.34	-0.06	-15.00	0.03	10.39
Germany	0.06	0.06	0.05	0.05	3.50	3.73	3.80	3.80	0.21	0.21	0.19	0.19	0.00	0.00	-0.02	-7.32
Spain	0.71	0.62	0.66	0.66	4.68	3.94	4.39	4.39	3.32	2.42	2.90	2.90	0.00	0.00	0.48	19.74
Other W. Europe	0.20	0.19	0.18	0.18	1.23	1.24	1.67	1.67	0.24	0.23	0.30	0.30	0.00	0.00	0.07	30.43
Austria	0.14	0.12	0.15	0.15	4.00	3.91	4.22	4.22	0.57	0.47	0.62	0.62	0.00	0.00	0.15	33.33
Sweden	0.09	0.07	0.07	0.07	4.12	4.03	4.14	4.14	0.35	0.28	0.29	0.29	0.00	0.00	0.01	4.32
Turkey	0.04	0.03	0.05	0.05	3.93	4.12	4.80	4.80	0.17	0.14	0.24	0.24	0.00	0.00	0.10	76.47
Others	0.17	0.17	0.17	0.17	1.41	1.41	1.39	1.39	0.24	0.24	0.23	0.23	0.00	0.00	-0.01	-4.17
	0.13	0.13	0.12	0.12	0.67	0.70	0.70	0.70	0.08	0.09	0.08	0.08	-0.00	-0.00	-0.01	-5.62

TABLE 9
Sorghum Area, Yield, and Production
World and Selected Countries and Regions

Country/Region	Area				Yield				Production				Change in Production			
	Prel.		1993/94 Proj.		Prel.		1993/94 Proj.		Prel.		1993/94 Proj.		From last month		From last year	
	1991/92	1992/93	Jan.	Feb.	1991/92	1992/93	Jan.	Feb.	1991/92	1992/93	Jan.	Feb.	MMT	Percent	MMT	Percent
	Million hectares				Metric tons per hectare				Million metric tons							
World	38.01	40.15	38.52	38.56	1.36	1.58	1.42	1.42	51.60	63.53	54.65	54.65	0.00	0.00	-8.87	-13.97
United States	3.99	4.92	3.84	3.84	3.72	4.57	3.76	3.76	14.86	22.46	14.42	14.42	0.00	0.00	-8.03	-35.76
Total Foreign	34.01	35.23	34.68	34.72	1.08	1.17	1.16	1.16	36.74	41.07	40.23	40.23	0.00	0.00	-0.84	-2.06
India	12.59	13.50	13.30	13.30	0.67	0.95	0.94	0.94	8.40	12.80	12.50	12.50	0.00	0.00	-0.30	-2.34
China	1.39	1.30	1.30	1.34	3.55	3.65	3.85	3.73	4.93	4.74	5.00	5.00	0.00	0.00	0.26	5.49
Mexico	0.82	0.70	0.60	0.60	3.17	2.71	3.17	3.17	2.60	1.90	1.90	1.90	0.00	0.00	0.00	0.00
Nigeria	4.40	4.80	4.60	4.60	0.80	0.79	0.80	0.80	3.50	3.80	3.70	3.70	0.00	0.00	-0.10	-2.63
Sudan	4.20	4.50	4.35	4.35	0.80	0.90	0.80	0.80	3.36	4.05	3.50	3.50	0.00	0.00	-0.55	-13.58
Argentina	0.72	0.75	0.70	0.70	3.84	4.00	3.57	3.57	2.77	3.00	2.50	2.50	0.00	0.00	-0.50	-16.67
Australia	0.57	0.43	0.60	0.60	2.54	1.09	1.67	1.67	1.44	0.47	1.00	1.00	0.00	0.00	0.53	111.86
Ethiopia	0.95	0.93	0.93	0.93	1.05	1.15	1.20	1.20	1.00	1.06	1.11	1.11	0.00	0.00	0.05	4.72
Colombia	0.24	0.25	0.26	0.26	3.00	3.00	3.00	3.00	0.72	0.75	0.77	0.77	0.00	0.00	0.01	2.00
Venezuela	0.27	0.24	0.13	0.13	2.18	2.20	1.88	1.88	0.58	0.53	0.25	0.25	0.00	0.00	-0.28	-52.65
Egypt	0.13	0.13	0.13	0.13	4.70	4.73	4.77	4.77	0.62	0.62	0.62	0.62	0.00	0.00	0.00	0.81
Yemen	0.61	0.61	0.61	0.61	1.00	1.00	1.00	1.00	0.61	0.61	0.61	0.61	0.00	0.00	0.00	0.00
Tanzania	0.55	0.65	0.68	0.68	0.95	0.92	0.96	0.96	0.53	0.60	0.65	0.65	0.00	0.00	0.05	8.33
Niger	1.40	1.30	1.30	1.30	0.39	0.35	0.35	0.35	0.55	0.45	0.45	0.45	0.00	0.00	0.00	0.00
Rep. of South Africa	0.14	0.17	0.14	0.14	0.73	2.24	2.07	2.07	0.10	0.38	0.29	0.29	0.00	0.00	-0.09	-23.68
Thailand	0.14	0.14	0.15	0.15	1.07	1.07	1.20	1.20	0.15	0.15	0.18	0.18	0.00	0.00	0.03	20.00
Others	21.28	21.59	21.23	21.27	1.32	1.30	1.30	1.30	28.19	28.12	27.55	27.55	0.00	0.00	-0.57	-2.04

February 1994

Production Estimates & Crop Assessment Division, FAS, USDA

TABLE 10
Rice Area, Yield, and Production
World and Selected Countries and Regions

Country/Region	Area				Yield (Rough)				Production (Milled)				Change in Production			
	Prel.				Prel.				Prel.				From last month			
	1991/92	1992/93	1993/94 Proj.	1993/94 Proj.	1991/92	1992/93	1993/94 Proj.	1993/94 Proj.	1991/92	1992/93	1993/94 Proj.	1993/94 Proj.	From last month	From last year	From last year	From last year
	Million hectares				Metric tons per hectare				Million metric tons				MMT	Percent	MMT	Percent
World	145.74	145.13	145.13	143.96	3.53	3.58	3.54	3.57	348.28	351.35	346.92	346.69	-0.24	-0.07	-4.66	-1.33
United States	1.12	1.27	1.15	1.15	6.36	6.43	6.18	6.18	5.04	5.70	4.96	4.96	0.00	0.00	-0.75	-13.10
Total Foreign	144.62	143.87	143.98	142.81	3.51	3.55	3.52	3.55	343.24	345.64	341.97	341.73	-0.24	-0.07	-3.91	-1.13
Major Exporters	15.67	16.23	17.07	17.07	2.43	2.34	2.26	2.26	24.13	24.04	24.28	24.28	0.00	0.00	0.24	0.99
Thailand	9.05	9.40	9.60	9.60	2.25	2.12	1.93	1.93	13.46	13.15	12.20	12.20	0.00	0.00	-0.95	-7.25
Burma	4.52	4.86	5.26	5.26	2.83	2.76	2.79	2.79	7.42	7.77	8.50	8.50	0.00	0.00	0.73	9.37
Pakistan	2.10	1.97	2.21	2.21	2.32	2.37	2.43	2.43	3.24	3.12	3.58	3.58	0.00	0.00	0.46	14.89
Major Importers	13.70	14.35	14.74	14.74	4.19	4.18	4.05	4.05	38.36	40.03	39.90	39.90	0.00	0.00	-0.13	-0.33
Indonesia	10.28	10.87	11.25	11.25	4.35	4.35	4.28	4.28	29.04	30.75	31.33	31.33	0.00	0.00	0.58	1.90
Rep. of Korea	1.21	1.16	1.14	1.14	6.14	6.27	5.63	5.63	5.39	5.33	4.70	4.70	0.00	0.00	-0.63	-11.84
European Union	0.37	0.36	0.34	0.34	6.20	6.19	5.69	5.69	1.49	1.43	1.26	1.26	0.00	0.00	-0.16	-11.51
Iran	0.58	0.65	0.65	0.65	3.79	3.46	3.46	3.46	1.45	1.50	1.50	1.50	0.00	0.00	0.00	0.00
Nigeria	0.60	0.66	0.68	0.68	1.33	1.37	1.42	1.42	0.48	0.54	0.58	0.58	0.00	0.00	0.04	7.41
Other Foreign	114.57	112.64	111.50	110.33	3.60	3.67	3.66	3.70	279.95	280.80	276.96	276.72	-0.24	-0.08	-4.08	-1.45
China	32.59	32.09	31.30	30.20	5.64	5.80	5.81	6.03	128.67	130.35	127.40	127.40	0.00	0.00	-2.95	-2.27
India	42.31	41.40	41.20	41.20	2.61	2.63	2.68	2.68	73.66	72.50	73.50	73.50	0.00	0.00	1.00	1.38
Bangladesh	10.24	10.08	10.00	10.00	2.67	2.68	2.70	2.70	18.25	18.02	18.00	18.00	0.00	0.00	-0.02	-0.11
Vietnam	6.52	6.53	6.40	6.40	3.36	3.30	3.41	3.41	14.48	14.21	14.39	14.39	0.00	0.00	0.18	1.25
Japan	2.05	2.11	2.13	2.13	5.86	6.28	4.51	4.51	8.74	9.62	7.00	7.00	0.00	0.00	-2.62	-27.24
Brazil	4.61	4.38	4.20	4.20	2.19	2.26	2.31	2.31	6.87	6.73	6.60	6.60	0.00	0.00	-0.13	-1.98
Philippines	3.29	3.24	3.20	3.20	2.78	2.94	2.88	2.88	5.94	6.18	6.00	6.00	0.00	0.00	-0.18	-2.96
Taiwan	0.43	0.40	0.40	0.40	5.36	5.19	5.34	5.34	1.67	1.50	1.56	1.56	0.00	0.00	0.06	4.14
FSU-12	0.60	0.62	0.66	0.62	3.33	3.23	3.48	3.24	1.30	1.31	1.49	1.31	-0.19	-12.39	0.00	0.15
Russia	0.27	0.27	0.30	0.26	2.89	2.85	3.08	2.96	0.50	0.49	0.60	0.50	-0.10	-16.67	0.01	1.83
Australia	0.13	0.13	0.14	0.14	8.81	7.65	8.85	8.85	0.70	0.59	0.74	0.74	0.00	0.00	0.15	25.00
Others	11.81	11.67	11.87	11.84	2.77	2.80	2.85	2.84	19.69	19.79	20.28	20.23	-0.05	-0.25	0.44	2.23

TABLE 11

Total Oilseed Area, Yield, and Production

World and Selected Countries and Regions

Country/Region	Area				Yield				Production				Change in Production			
	Prel.		1993/94 Proj.		Prel.		1993/94 Proj.		Prel.		1993/94 Proj.		From last month		From last year	
	1991/92	1992/93	Jan.	Feb.	1991/92	1992/93	Jan.	Feb.	1991/92	1992/93	Jan.	Feb.				
World Total 1/ Total Foreign 1/ Copra Palm Kernel	-- -- -- --	-- -- -- --	-- -- -- --	-- -- -- --	-- -- -- --	-- -- -- --	-- -- -- --	-- -- -- --	223.31 159.00 4.73 3.41	226.89 158.48 4.73 4.00	223.11 165.40 4.84 4.02	223.74 166.03 4.66 4.36	MMT 0.63 0.63 -0.18 0.33	Percent 0.28 0.38 -3.80 8.33	MMT -3.14 7.55 -0.07 0.36	Percent -1.39 4.76 -1.52 9.09
Major Oilseeds 2/ United States 2/	146.67 30.69	145.66 29.63	139.80 29.77	149.98 29.77	1.47 2.10	1.50 2.31	1.53 1.94	1.43 1.94	215.17 64.32	218.16 68.41	214.25 57.71	214.73 57.71	0.48 0.00	0.22 0.00	-3.43 -10.69	-1.57 -15.63
Foreign Oilseeds 2/ China Brazil India Argentina FSU - 12 Russia Ukraine Uzbekistan Turkmenistan Canada European Union France Italy Germany Spain United Kingdom Indonesia Pakistan Eastern Europe Poland Romania Hungary Turkey Philippines Paraguay Mexico Others	115.98 23.32 11.75 27.76 8.37 8.74 3.51 1.77 1.72 0.60 3.82 5.70 1.87 0.56 1.07 1.17 0.44 1.99 3.30 2.34 0.47 0.59 0.48 1.23 0.09 1.42 0.68 15.48	116.03 23.82 12.01 27.98 7.64 9.02 3.73 1.79 1.67 0.57 3.54 5.73 1.71 0.49 1.08 1.47 0.42 2.08 3.31 2.58 0.42 0.78 0.48 1.41 0.10 1.29 0.45	110.03 22.97 12.93 29.17 8.22 9.06 3.82 1.79 1.63 0.56 4.86 5.70 1.44 0.30 1.11 1.83 0.37 2.19 3.19 2.22 0.35 0.60 0.42 1.33 0.10 1.51 0.40	120.20 24.10 12.78 29.17 8.22 8.92 3.68 1.78 1.63 0.56 4.86 5.68 1.45 0.30 1.11 1.83 0.37 2.19 3.19 2.55 0.35 0.94 0.42 1.33 0.10 1.51 0.40	1.30 1.47 1.76 0.73 1.90 1.28 1.06 1.51 1.56 1.29 1.52 2.29 2.66 3.00 2.62 0.91 2.96 1.23 1.44 1.89 2.23 1.35 2.01 1.37 0.79 1.12 1.66 0.88	1.29 1.38 1.93 0.82 1.92 1.14 1.00 1.35 1.42 1.25 1.47 2.10 2.33 2.74 2.81 1.03 2.73 1.23 1.05 1.60 1.81 1.15 1.74 1.43 0.78 1.56 1.72 0.90	1.42 1.50 1.91 0.82 1.97 1.19 0.99 1.32 1.53 1.32 1.51 1.94 2.42 2.93 2.81 0.74 2.83 1.20 1.02 1.63 2.00 1.21 1.76 1.46 0.79 1.45 1.71 0.91	1.31 1.48 1.94 0.81 1.97 1.16 0.95 1.33 1.53 1.32 1.51 1.92 2.36 2.93 2.81 0.74 2.83 1.20 0.99 1.44 2.00 0.83 1.76 1.46 0.79 1.45 1.71 0.91	150.86 34.21 20.66 20.36 15.86 11.21 3.72 2.66 2.68 0.78 5.82 13.06 4.99 1.68 2.79 1.06 1.30 2.46 4.77 4.43 1.04 0.80 0.96 1.69 0.07 1.60 1.13 13.55	149.76 32.75 23.18 23.04 14.65 10.32 3.74 2.42 2.38 0.71 5.20 12.01 3.99 1.34 3.04 1.51 1.15 2.55 3.49 4.13 0.76 0.90 0.84 2.02 0.08 2.01 0.77 13.56	156.53 34.40 24.75 23.80 16.22 10.76 3.80 2.36 2.51 0.74 7.33 11.05 3.48 0.89 3.11 1.35 1.06 2.63 3.26 3.62 0.69 0.73 0.73 1.94 0.08 2.19 0.69 13.82	157.01 35.71 24.75 23.65 16.22 10.31 3.48 2.38 2.51 0.74 7.33 10.89 3.41 0.89 3.11 1.35 1.06 2.63 3.15 3.67 0.69 0.78 0.73 1.94 0.08 2.19 0.69 13.82	0.48 1.31 0.00 -0.15 0.00 -0.45 0.02 0.00 0.00 0.00 -0.16 -0.07 0.00 0.00 0.00 0.00 0.00 -0.11 0.05 0.00 0.00 0.00 0.00 0.00 0.00 0.00 -0.01 0.26	0.31 3.81 0.00 -0.63 0.00 -4.16 -8.42 0.64 0.00 0.00 -1.44 -2.01 0.00 0.00 0.00 0.00 0.00 -3.35 1.24 0.00 6.16 0.00 0.00 0.00 0.00 0.00 -0.06	7.26 2.96 1.57 0.61 1.57 -0.01 -0.26 -0.05 0.13 0.03 2.13 -1.11 -0.58 -0.45 0.07 -0.16 -0.09 0.08 -0.34 -0.46 -0.07 -0.13 -0.11 -0.08 0.00 0.18 -0.08 0.26	4.85 9.05 6.75 2.63 10.69 -0.12 -7.00 -1.98 5.47 4.23 41.07 -9.28 -14.55 -33.58 2.17 -10.66 -7.83 2.94 -9.74 -11.21 -8.97 -13.87 -13.08 -4.01 6.58 8.94 -10.77 1.90

1/ Major oilseeds plus copra and palm kernel. 2/ Individual countries and regions include soybean, cottonseed, peanut (inshell), sunflowerseed, and rapeseed.

TABLE 12
Soybean Area, Yield, and Production
World and Selected Countries and Regions

Country/Region	Area				Yield				Production				Change in Production			
	Prel.		1993/94 Proj.		Prel.		1993/94 Proj.		Prel.		1993/94 Proj.		From last month		From last year	
	1991/92	1992/93	Jan.	Feb.	1991/92	1992/93	Jan.	Feb.	1991/92	1992/93	Jan.	Feb.	MMT	Percent	MMT	Percent

TABLE 13
Cottonseed Area, Yield, and Production
World and Selected Countries and Regions

Country/Region	Area				Yield				Production				Change in Production			
	1991/92		1992/93		1991/92		1992/93		1991/92		1992/93		1991/92		1992/93	
	Prel.	1993/94 Proj.	Jan.	Feb.	Prel.	1993/94 Proj.	Jan.	Feb.	Prel.	1993/94 Proj.	Jan.	Feb.	From last month	From last year	MMT	Percent
	1991/92	1992/93	Jan.	Feb.	1991/92	1992/93	Jan.	Feb.	1991/92	1992/93	Jan.	Feb.	From last month	From last year	MMT	Percent
	Million hectares				Metric tons per hectare				Million metric tons				MMT	Percent	MMT	Percent
World	34.67	32.39	31.33	31.48	1.05	0.97	0.98	0.96	36.56	31.49	30.68	30.25	-0.44	-1.42	-1.25	-3.96
United States	5.25	4.51	5.18	5.18	1.20	1.25	1.10	1.10	6.28	5.65	5.69	5.69	0.00	0.00	0.04	0.65
Total Foreign	29.43	27.88	26.15	26.30	1.03	0.93	0.96	0.93	30.27	25.84	24.99	24.56	-0.44	-1.74	-1.28	-4.96
China	6.54	6.84	5.30	5.46	1.48	1.12	1.29	1.22	9.66	7.66	6.85	6.66	-0.19	-2.77	-1.00	-13.05
FSU-12	3.01	2.89	2.83	2.83	1.47	1.27	1.37	1.37	4.44	3.68	3.90	3.90	0.00	0.00	0.22	5.84
Uzbekistan	1.72	1.67	1.63	1.63	1.56	1.42	1.53	1.53	2.68	2.37	2.50	2.50	0.00	0.00	0.13	5.49
Turkmenistan	0.60	0.57	0.56	0.56	1.29	1.25	1.32	1.32	0.78	0.71	0.74	0.74	0.00	0.00	0.03	4.23
Pakistan	2.84	2.84	2.72	2.72	1.54	1.09	1.04	1.00	4.36	3.08	2.83	2.72	-0.11	-3.85	-0.36	-11.72
India	7.70	7.53	7.50	7.50	0.52	0.62	0.61	0.59	4.00	4.64	4.60	4.45	-0.15	-3.26	-0.19	-3.99
Brazil	1.95	1.22	1.13	1.13	0.61	0.60	0.70	0.70	1.19	0.73	0.79	0.79	0.00	0.00	0.06	8.22
Turkey	0.60	0.64	0.55	0.55	1.47	1.40	1.46	1.46	0.88	0.89	0.81	0.81	0.00	0.00	-0.08	-9.09
African Franc Zone	1.23	1.23	1.14	1.13	0.72	0.78	0.80	0.80	0.89	0.96	0.91	0.91	0.00	0.00	-0.06	-5.73
Australia	0.28	0.26	0.27	0.27	2.57	2.02	1.70	1.51	0.72	0.53	0.46	0.40	-0.06	-13.04	-0.13	-24.24
Egypt	0.36	0.36	0.36	0.37	1.24	1.50	1.36	1.70	0.44	0.54	0.49	0.63	0.14	29.90	0.09	17.76
Argentina	0.58	0.33	0.50	0.50	0.74	0.85	0.83	0.83	0.43	0.28	0.42	0.42	0.00	0.00	0.14	51.27
Paraguay	0.48	0.27	0.42	0.42	0.53	0.83	0.83	0.83	0.26	0.22	0.35	0.35	0.00	0.00	0.13	59.09
Greece	0.23	0.28	0.34	0.34	1.57	1.57	1.54	1.54	0.36	0.43	0.52	0.52	0.00	0.00	0.09	20.55
Syria	0.17	0.21	0.19	0.19	2.03	1.70	1.86	1.86	0.35	0.36	0.36	0.36	0.00	0.00	0.00	0.00
Mexico	0.25	0.04	0.03	0.03	1.18	1.79	1.77	1.77	0.29	0.08	0.06	0.06	0.00	0.00	-0.02	-26.67
Colombia	0.28	0.12	0.12	0.12	1.01	1.02	1.02	0.76	0.28	0.13	0.12	0.09	-0.03	-25.00	-0.03	-28.00
Sudan	0.19	0.15	0.15	0.15	0.99	0.99	1.32	1.20	0.19	0.15	0.20	0.18	-0.02	-9.00	0.03	21.33
Others	2.75	2.70	2.59	2.59	0.56	0.56	0.52	0.51	1.53	1.50	1.35	1.32	-0.02	-1.78	-0.18	-11.97

TABLE 14

Peanut Area, Yield, and Production

World and Selected Countries and Regions

Country/Region	Area				Yield				Production				Change in Production			
	Prel.		1993/94 Proj.		Prel.		1993/94 Proj.		Prel.		1993/94 Proj.		From last month		From last year	
	1991/92	1992/93	Jan.	Feb.	1991/92	1992/93	Jan.	Feb.	1991/92	1992/93	Jan.	Feb.	MMT	Percent	MMT	Percent
World	19.80	19.39	19.75	19.84	1.13	1.18	1.16	1.18	22.30	22.93	22.98	23.48	0.50	2.18	0.55	2.38
United States	0.82	0.68	0.66	0.66	2.74	2.87	2.28	2.28	2.24	1.94	1.51	1.51	0.00	0.00	-0.43	-22.34
Total Foreign	18.98	18.71	19.09	19.18	1.06	1.12	1.12	1.15	20.06	20.99	21.47	21.97	0.50	2.33	0.98	4.67
India	8.67	8.39	8.55	8.55	0.81	1.03	0.87	0.87	7.07	8.60	7.40	7.40	0.00	0.00	-1.20	-13.95
China	2.88	2.98	3.25	3.34	2.19	2.00	2.31	2.40	6.30	5.95	7.50	8.00	0.50	6.67	2.05	34.39
Indonesia	0.64	0.66	0.67	0.67	1.48	1.48	1.48	1.48	0.95	0.97	0.99	0.99	0.00	0.00	0.02	2.06
Senegal	0.87	0.93	0.78	0.78	0.86	0.63	0.81	0.81	0.75	0.58	0.63	0.63	0.00	0.00	0.05	7.94
Burma	0.54	0.48	0.54	0.54	0.81	0.89	0.85	0.85	0.44	0.43	0.46	0.46	0.00	0.00	0.03	8.24
Argentina	0.19	0.12	0.12	0.12	2.57	2.39	2.50	2.50	0.48	0.28	0.30	0.30	0.00	0.00	0.03	9.09
Sudan	0.53	0.55	0.55	0.55	0.75	0.71	0.71	0.71	0.40	0.39	0.39	0.39	0.00	0.00	0.00	0.00
Zaire	0.53	0.53	0.53	0.53	0.72	0.72	0.72	0.72	0.38	0.38	0.38	0.38	0.00	0.00	0.00	0.00
Nigeria	0.48	0.50	0.50	0.50	0.46	0.50	0.50	0.50	0.22	0.25	0.25	0.25	0.00	0.00	0.00	0.00
Vietnam	0.30	0.30	0.30	0.30	0.98	0.98	0.98	0.98	0.30	0.30	0.30	0.30	0.00	0.00	0.00	0.00
Rep. of South Africa	0.20	0.16	0.15	0.15	0.56	1.05	1.07	1.07	0.11	0.17	0.16	0.16	0.00	0.00	-0.02	-9.88
Brazil	0.10	0.09	0.09	0.09	1.68	1.69	1.67	1.67	0.16	0.15	0.15	0.15	0.00	0.00	0.01	3.45
Thailand	0.12	0.12	0.13	0.13	1.31	1.32	1.32	1.32	0.16	0.16	0.17	0.17	0.00	0.00	0.00	1.85
Burkina Faso	0.23	0.23	0.23	0.23	0.69	0.69	0.69	0.69	0.16	0.16	0.16	0.16	0.00	0.00	0.00	0.00
Central African Rep.	0.13	0.13	0.13	0.13	1.12	1.12	1.12	1.12	0.15	0.15	0.15	0.15	0.00	0.00	0.00	0.00
Cameroon	0.32	0.32	0.32	0.32	0.44	0.44	0.44	0.44	0.14	0.14	0.14	0.14	0.00	0.00	0.00	0.00
Cote d' Ivoire	0.15	0.15	0.15	0.15	0.97	0.98	0.98	0.98	0.15	0.15	0.15	0.15	0.00	0.00	0.00	0.00
Gambia	0.10	0.10	0.10	0.10	1.26	1.26	1.26	1.26	0.12	0.12	0.12	0.12	0.00	0.00	0.00	0.00
Uganda	0.14	0.14	0.14	0.14	0.79	0.79	0.79	0.79	0.11	0.11	0.11	0.11	0.00	0.00	0.00	0.00
Others	1.87	1.86	1.88	1.88	0.82	0.85	0.85	0.85	1.53	1.57	1.59	1.59	0.00	0.00	0.02	1.02

TABLE 15
Sunflowerseed Area, Yield, and Production
World and Selected Countries and Regions

Country/Region	Area				Yield				Production				Change in Production			
	Prel.				Prel.				Prel.				From last month			
	1991/92	1992/93	1993/94 Proj.	1993/94 Proj.	1991/92	1992/93	1993/94 Proj.	1993/94 Proj.	1991/92	1992/93	1993/94 Proj.	1993/94 Proj.	From last month	From last year	From last year	From last year
	Million hectares				Metric tons per hectare				Million metric tons				MMT	Percent	MMT	Percent
World	17.12	17.65	18.05	18.35	1.26	1.21	1.18	1.14	21.54	21.42	21.34	20.91	-0.43	-2.02	-0.51	-2.38
United States	1.08	0.84	1.01	1.01	1.51	1.41	1.16	1.16	1.64	1.18	1.18	1.18	0.00	0.00	-0.00	-0.25
Total Foreign	16.04	16.81	17.04	17.33	1.24	1.20	1.18	1.14	19.91	20.24	20.17	19.73	-0.43	-2.14	-0.51	-2.50
FSU-12	4.51	4.99	5.00	5.00	1.25	1.14	1.15	1.08	5.64	5.69	5.76	5.41	-0.35	-5.99	-0.28	-4.87
Russia	2.58	2.89	2.90	2.90	1.12	1.06	1.03	0.97	2.90	3.07	3.00	2.80	-0.20	-6.67	-0.27	-8.88
Ukraine	1.60	1.64	1.64	1.64	1.53	1.39	1.34	1.34	2.45	2.28	2.20	2.20	0.00	0.00	-0.08	-3.38
Argentina	2.80	2.30	2.20	2.20	1.36	1.35	1.50	1.50	3.80	3.10	3.30	3.30	0.00	0.00	0.20	6.45
European Union	2.40	2.64	2.91	2.92	1.68	1.54	1.26	1.23	4.04	4.06	3.66	3.59	-0.07	-1.91	-0.47	-11.51
France	1.07	0.99	0.81	0.82	2.40	2.14	2.17	2.06	2.57	2.11	1.76	1.69	-0.07	-3.98	-0.42	-19.91
Spain	1.07	1.37	1.80	1.80	0.84	1.00	0.72	0.72	0.90	1.36	1.30	1.30	0.00	0.00	-0.06	-4.41
Italy	0.13	0.12	0.12	0.12	2.44	2.29	2.35	2.35	0.32	0.28	0.27	0.27	0.00	0.00	-0.00	-1.82
Eastern Europe	1.37	1.67	1.49	1.81	1.72	1.56	1.49	1.24	2.35	2.61	2.22	2.24	0.02	1.04	-0.37	-14.04
Hungary	0.39	0.43	0.38	0.38	2.05	1.77	1.81	1.81	0.80	0.76	0.68	0.68	0.00	0.00	-0.08	-10.05
Romania	0.48	0.62	0.53	0.86	1.28	1.26	1.25	0.80	0.61	0.77	0.66	0.68	0.02	3.48	-0.09	-11.76
Yugoslavia	0.17	0.20	0.20	0.20	2.17	1.86	2.00	2.00	0.38	0.36	0.40	0.40	0.00	0.00	0.04	10.50
Bulgaria	0.27	0.38	0.33	0.33	1.61	1.58	1.15	1.15	0.43	0.60	0.38	0.38	0.00	0.00	-0.22	-37.00
Czechoslovakia	0.06	0.05	0.05	0.05	2.32	2.30	2.00	2.00	0.13	0.12	0.10	0.10	0.00	0.00	-0.02	-13.04
China	0.75	0.81	0.72	0.71	1.47	1.46	1.74	1.77	1.10	1.18	1.25	1.25	0.00	0.00	0.07	5.93
Turkey	0.55	0.70	0.70	0.70	1.18	1.40	1.40	1.40	0.65	0.98	0.98	0.98	0.00	0.00	0.00	0.00
India	2.10	2.20	2.30	2.30	0.56	0.59	0.65	0.65	1.18	1.30	1.50	1.50	0.00	0.00	0.20	15.38
Rep. of South Africa	0.45	0.40	0.45	0.45	0.38	0.91	0.89	0.89	0.17	0.36	0.40	0.40	0.00	0.00	0.04	9.89
Australia	0.08	0.06	0.17	0.14	1.06	0.64	1.01	0.92	0.08	0.04	0.17	0.13	-0.04	-23.08	0.09	242.11
Burma	0.18	0.16	0.17	0.17	0.60	0.71	0.62	0.62	0.11	0.11	0.11	0.11	0.00	0.00	-0.01	-6.25
Others	0.85	0.90	0.93	0.93	0.92	0.91	0.89	0.89	0.79	0.82	0.83	0.83	-0.00	-0.00	0.01	1.47

TABLE 16

Rapeseed Area, Yield, and Production

World and Selected Countries and Regions

Country/Region	Area				Yield				Production				Change in Production			
	Prel.		1993/94 Proj.		Prel.		1993/94 Proj.		Prel.		1993/94 Proj.		From last month		From last year	
	1991/92	1992/93	Jan.	Feb.	1991/92	1992/93	Jan.	Feb.	1991/92	1992/93	Jan.	Feb.	MMT	Percent	MMT	Percent
	Million hectares				Metric tons per hectare				Million metric tons				MMT	Percent	MMT	Percent
World	20.61	19.54	20.37	20.11	1.35	1.32	1.33	1.34	27.85	25.89	27.18	27.02	-0.16	-0.58	1.13	4.38
United States	0.07	0.06	0.08	0.08	1.42	1.55	1.51	1.51	0.09	0.09	0.12	0.12	0.00	0.00	0.03	38.82
Total Foreign	20.54	19.49	20.29	20.03	1.35	1.32	1.33	1.34	27.76	25.80	27.06	26.90	-0.16	-0.59	1.10	4.27
India	6.47	6.20	6.42	6.42	0.90	0.87	0.90	0.90	5.84	5.40	5.80	5.80	0.00	0.00	0.40	7.41
China	6.10	5.98	5.40	5.30	1.22	1.28	1.26	1.28	7.44	7.65	6.80	6.80	0.00	0.00	-0.85	-11.15
Canada	3.14	2.90	4.06	4.06	1.34	1.27	1.33	1.33	4.22	3.69	5.40	5.40	0.00	0.00	1.71	46.38
European Union	2.51	2.32	2.19	2.16	2.80	2.70	2.79	2.79	7.03	6.25	6.11	6.02	-0.09	-1.46	-0.23	-3.74
France	0.74	0.69	0.57	0.57	3.07	2.64	2.80	2.80	2.27	1.81	1.60	1.60	0.00	0.00	-0.21	-11.82
Germany	1.00	1.01	1.02	1.02	2.61	2.79	2.80	2.80	2.62	2.81	2.86	2.86	0.00	0.00	0.05	1.64
United Kingdom	0.44	0.42	0.37	0.37	2.96	2.73	2.83	2.83	1.30	1.15	1.06	1.06	0.00	0.00	-0.09	-7.83
Denmark	0.28	0.17	0.19	0.16	2.59	2.37	2.74	2.64	0.73	0.41	0.52	0.43	-0.09	-17.12	0.03	6.16
Eastern Europe	0.73	0.61	0.54	0.54	2.26	1.97	2.17	2.17	1.64	1.20	1.16	1.16	0.00	0.00	-0.04	-3.17
Poland	0.47	0.42	0.35	0.35	2.23	1.81	2.00	2.00	1.04	0.76	0.69	0.69	0.00	0.00	-0.07	-8.97
Czechoslovakia	0.17	0.15	0.15	0.15	2.70	2.52	2.80	2.80	0.45	0.38	0.42	0.42	0.00	0.00	0.04	12.00
FSU-12	0.41	0.36	0.47	0.34	0.80	0.90	0.85	0.90	0.33	0.32	0.40	0.31	-0.10	-23.75	-0.02	-4.98
Russia	0.27	0.20	0.30	0.16	0.74	0.82	0.83	0.81	0.20	0.16	0.25	0.13	-0.12	-48.00	-0.03	-20.73
Sweden	0.15	0.13	0.15	0.15	1.74	1.94	2.00	2.00	0.25	0.25	0.30	0.30	0.00	0.00	0.05	21.46
Pakistan	0.32	0.32	0.31	0.31	0.69	0.76	0.74	0.74	0.22	0.24	0.23	0.23	0.00	0.00	-0.02	-7.41
Bangladesh	0.35	0.35	0.35	0.35	0.66	0.66	0.66	0.66	0.23	0.23	0.23	0.23	0.00	0.00	0.00	0.00
Finland	0.06	0.07	0.07	0.07	1.72	1.80	1.81	1.81	0.11	0.12	0.13	0.13	0.00	0.00	0.01	6.72
Others	0.32	0.26	0.35	0.34	1.44	1.73	1.47	1.59	0.46	0.45	0.51	0.54	0.02	4.86	0.09	19.51

TABLE 17
Copra, Palm Kernel, and Palm Oil Production
World and Selected Countries and Regions

Country/Region	Production				Change in Production			
	Prel.		1993/94 Proj.		From last month		From last year	
	1991/92	1992/93	Jan.	Feb.				
	Million metric tons				MMT	Percent	MMT	Percent
COPRA								
World	4.73	4.73	4.84	4.66	-0.18	-3.80	-0.07	-1.52
Philippines	1.93	2.10	2.18	2.00	-0.18	-8.44	-0.11	-5.13
Indonesia	1.33	1.15	1.20	1.20	0.00	0.00	0.05	4.35
India	0.45	0.45	0.45	0.45	0.00	0.00	0.00	0.00
Mexico	0.19	0.20	0.20	0.20	0.00	0.00	0.00	0.00
Sri Lanka	0.06	0.08	0.07	0.07	0.00	0.00	-0.01	-12.50
Vietnam	0.13	0.13	0.13	0.13	0.00	0.00	0.00	0.00
Malaysia	0.08	0.07	0.07	0.07	0.00	0.00	-0.00	-2.70
Others	0.56	0.55	0.55	0.55	0.00	0.00	-0.00	-0.36
PALM KERNEL								
World	3.41	4.00	4.02	4.36	0.33	8.33	0.36	9.09
Malaysia	1.81	2.14	2.23	2.28	0.06	2.47	0.14	6.69
Indonesia	0.66	0.86	0.75	1.03	0.28	37.58	0.16	19.19
Nigeria	0.27	0.28	0.28	0.28	0.00	0.00	0.00	0.00
Cote d' Ivoire	0.06	0.06	0.06	0.06	0.00	0.00	0.00	5.17
Colombia	0.07	0.07	0.08	0.08	0.00	0.00	0.00	4.17
Thailand	0.05	0.06	0.06	0.06	0.00	0.00	0.00	9.09
Zaire	0.03	0.03	0.03	0.03	0.00	0.00	0.00	0.00
Ecuador	0.02	0.02	0.02	0.02	0.00	0.00	0.00	4.55
Others	0.44	0.48	0.52	0.52	-0.00	-0.00	0.04	8.94
PALM OIL								
World	11.49	12.94	13.83	13.83	0.00	0.00	0.89	6.86
Malaysia	6.22	7.13	7.60	7.60	0.00	0.00	0.47	6.67
Indonesia	2.75	3.25	3.60	3.60	0.00	0.00	0.35	10.77
Nigeria	0.63	0.60	0.60	0.60	0.00	0.00	0.00	0.00
Cote d' Ivoire	0.28	0.29	0.29	0.29	0.00	0.00	0.00	1.75
Colombia	0.30	0.32	0.33	0.33	0.00	0.00	0.01	2.80
Thailand	0.22	0.24	0.27	0.27	0.00	0.00	0.03	12.08
Zaire	0.11	0.11	0.11	0.11	0.00	0.00	0.00	0.00
Ecuador	0.14	0.14	0.14	0.14	0.00	0.00	0.00	1.43
Others	0.85	0.87	0.89	0.89	0.00	0.00	0.02	2.06

February 1994

Production Estimates & Crop Assessment Division, FAS, USDA

TABLE 18
Cotton Area, Yield, and Production
World and Selected Countries and Regions

Country/Region	Area				Yield				Production				Change In Production			
	Prel.		1993/94 Proj.		Prel.		1993/94 Proj.		Prel.		1993/94 Proj.		From Last Month		From Last Year	
	1991/92	1992/93	Jan.	Feb.	1991/92	1992/93	Jan.	Feb.	1991/92	1992/93	Jan.	Feb.	MBales	Percent	MBales	Percent
	Million hectares				Kilograms per hectare				Million 480 lb. bales				MBales	Percent	MBales	Percent
World	34.71	32.69	31.35	31.47	602	551	558	548	95.97	82.75	80.33	79.16	-1.17	-1.46	-3.60	-4.34
United States	5.25	4.51	5.18	5.18	731	783	681	681	17.61	16.22	16.18	16.18	0.00	0.00	-0.04	-0.26
Total Foreign	29.47	28.18	26.17	26.29	579	514	534	522	78.35	66.53	64.15	62.98	-1.17	-1.83	-3.55	-5.34
Major Exporters	18.07	17.28	15.40	15.54	743	620	668	652	61.64	49.22	47.28	46.58	-0.70	-1.48	-2.65	-5.37
China	6.54	6.84	5.30	5.46	869	659	760	718	26.10	20.70	18.50	18.00	-0.50	-2.70	-2.70	-13.04
Pakistan	2.84	2.84	2.72	2.72	768	543	520	500	10.00	7.07	6.50	6.25	-0.25	-3.85	-0.82	-11.64
Sudan	0.19	0.15	0.15	0.15	438	395	337	480	0.39	0.28	0.24	0.34	0.10	42.55	0.06	21.38
Turkey	0.60	0.64	0.55	0.55	937	901	943	943	2.58	2.64	2.40	2.40	0.00	0.00	-0.23	-8.92
FSU-12	3.01	2.89	2.83	2.83	814	701	753	753	11.25	9.30	9.80	9.80	0.00	0.00	0.50	5.38
Uzbekistan	1.72	1.67	1.63	1.63	860	784	842	842	6.79	6.00	6.30	6.30	0.00	0.00	0.30	5.00
Turkmenistan	0.60	0.57	0.56	0.56	710	684	719	719	1.97	1.79	1.85	1.85	0.00	0.00	0.06	3.35
Other	0.69	0.65	0.64	0.64	790	505	558	558	2.49	1.51	1.65	1.65	0.00	0.00	0.14	9.27
Egypt	0.36	0.36	0.37	0.37	814	988	1000	1089	1.34	1.62	1.70	1.85	0.15	8.82	0.23	14.20
African Franc Zone	1.23	1.24	1.15	1.14	438	438	453	457	2.47	2.50	2.39	2.39	0.00	0.00	-0.11	-4.29
Southern Hemisphere	3.31	2.34	2.32	2.32	494	477	540	522	7.52	5.12	5.75	5.55	-0.20	-3.48	0.43	8.42
Argentina	0.58	0.33	0.50	0.50	431	431	479	479	1.15	0.64	1.10	1.10	0.00	0.00	0.46	71.07
Australia	0.28	0.26	0.27	0.27	1780	1424	1210	1068	2.31	1.71	1.50	1.30	-0.20	-13.33	-0.41	-24.11
Brazil	1.97	1.49	1.13	1.13	381	310	405	405	3.45	2.11	2.10	2.10	0.00	0.00	-0.01	-0.62
Paraguay	0.48	0.27	0.42	0.42	281	534	544	544	0.62	0.65	1.05	1.05	0.00	0.00	0.40	61.54
Major Importers	0.44	0.43	0.43	0.41	831	837	865	880	1.67	1.67	1.69	1.65	-0.04	-2.07	-0.01	-0.90
Other Foreign	10.95	10.46	10.35	10.34	299	326	320	311	15.04	15.64	15.19	14.75	-0.44	-2.89	-0.89	-5.71
India	7.70	7.53	7.50	7.50	267	316	314	305	9.43	10.93	10.80	10.50	-0.30	-2.78	-0.43	-3.94
Others	3.26	2.93	2.85	2.84	375	350	336	326	5.61	4.71	4.39	4.25	-0.14	-3.17	-0.46	-9.80

TABLE 19

The table below presents a 12-year record of the difference between the February projections and the final estimates. Using world wheat production as an example, changes between the February projection and the final estimate have averaged 2.7 million tons (0.5 percent) and ranged from -7.3 to 6.8 million tons. The February projection has been below the final 9 times and above the final 3 times.

RELIABILITY OF PRODUCTION PROJECTIONS

COMMODITY AND REGION	PROJECTION AND FINAL ESTIMATES, 1981/82 – 1992/93 1/						
	Difference		Lowest	Highest	Below	Above	
	Average	Average	Difference		Final	Final	
	Percent	---- Million metric tons ----				Number of years 2/	
WHEAT							
World	0.5	2.7	-7.3	6.8	9	3	
U.S.	0.1	0.0	-0.1	0.1	5	2	
Foreign	0.6	2.7	-7.3	6.8	9	3	
COARSE GRAINS 3/							
World	0.6	4.9	-11.1	5.1	8	4	
U.S.	0.1	0.2	-0.2	1.3	9	1	
Foreign	0.9	5.0	-11.0	5.1	6	5	
RICE (Milled)							
World	1.5	4.6	-13.0	1.9	9	3	
U.S.	1.2	0.1	-0.2	0.1	5	1	
Foreign	1.5	4.5	-13.0	1.9	9	3	
SOYBEANS							
World	1.6	1.6	-2.3	2.1	7	5	
U.S.	1.0	0.5	-1.1	1.8	5	5	
Foreign	3.1	1.4	-2.2	2.2	9	3	
		---- Million 480-lb. bales ----					
COTTON							
World	1.9	1.6	-5.4	2.8	8	4	
U.S.	0.7	0.1	-0.1	0.3	3	8	
Foreign	2.4	1.7	-5.7	2.7	8	4	
UNITED STATES		----- Million bushels -----					
CORN	0.1	4	-8	38	2	1	
SORGHUM	0.1	1	0	4	0	2	
BARLEY	0.5	2	-3	11	7	1	
OATS	0.1	0	-2	0	3	0	

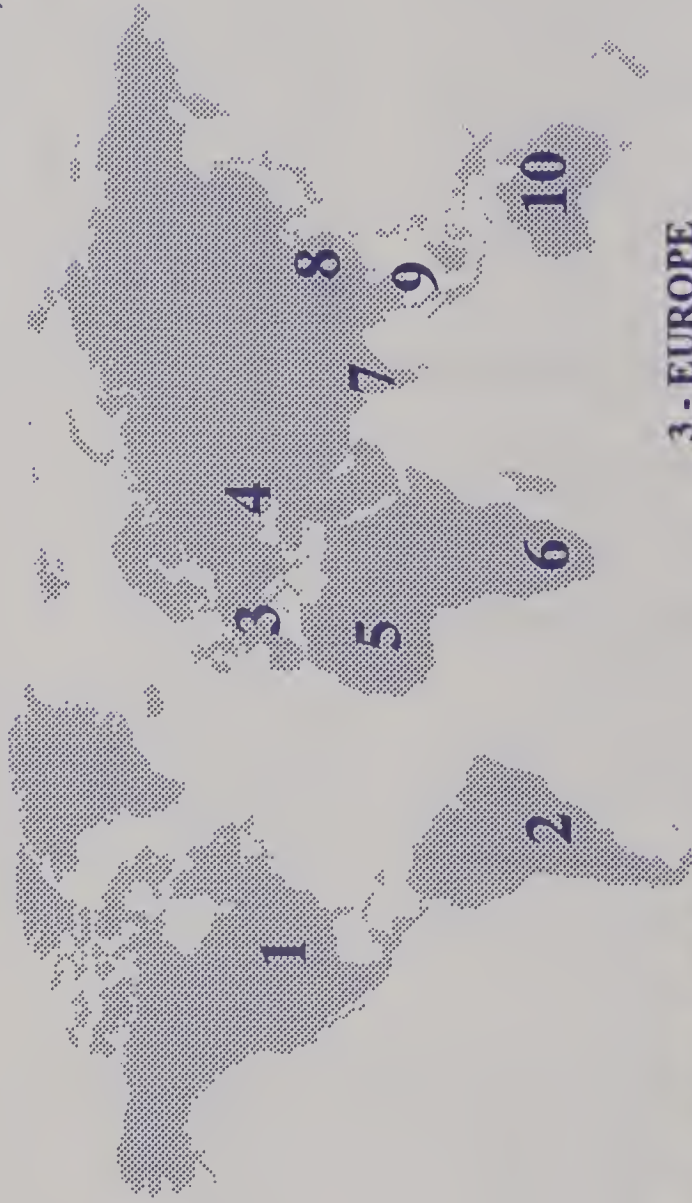
1/ The final estimate for 1981/82–1992/93 is defined as the first November estimate following the marketing year.

2/ May not total 12 if projection was the same as the final.

3/ Includes corn, sorghum, barley, oats, rye, millet, and mixed grain.

WORLD AGRICULTURAL WEATHER HIGHLIGHTS

FEBRUARY 10, 1994



6 - SOUTH AFRICA

Frequent rain and cool temperatures across the corn belt since early January have increased moisture for corn currently advancing through reproduction. In contrast, a drying trend since mid-January reduced moisture for sugarcane, although beneficial showers the past few days have brought some relief.

7 - SOUTH ASIA

Periodic rain across northern India helped rainfed winter grains and oilseeds. Early-February showers were timely for heading winter wheat in eastern India and Bangladesh. Pakistan continued mostly dry.

1 - UNITED STATES

Record-setting Arctic air stressed livestock from the northern Plains to the New England States into early February. Adequate snow cover protected northern wheat areas but snow cover was marginal in central and southern areas. Citrus and winter vegetables escaped damage from freezes reaching into northern Florida, south Texas and interior valley of California.

2 - SOUTH AMERICA

Widespread rains favored vegetative to reproductive soybeans across most of southern Brazil. Soil moisture reserves remained adequate for summer crops across central Argentina.

3 - EUROPE

Locally heavy rain drenched northern Germany in January, while periodic rain fell over most of Europe. Unfavorable dryness persisted in eastern Spain and precipitation was light over the Balkan region. Unseasonably mild weather throughout the period left winter crops vulnerable to winterkill.

4 - FSU

Recent bitter cold followed unusually mild weather in January over winter grains areas. A sufficient snow cover in areas of extreme cold minimized the threat of significant winterkill.

5 - NORTHWESTERN AFRICA

Below-normal rainfall in January limited moisture for vegetative winter grains in Morocco, Algeria, and Tunisia. Although recent showers eased stress on crops, moisture reserves remain unfavorably low.

8 - EASTERN ASIA

Seasonably dry weather prevailed across the North China Plain. Near to above normal rainfall helped increase reservoir levels across the Yangtze Valley.

9 - SOUTHEAST ASIA

Weekly showers maintained adequate to abundant irrigation levels for Java's rice, although some flooding occurred. Showers were sporadic over Malaysia's rice and oil palm areas. Seasonable rain benefited secondary crops in the Philippines. Hot, seasonably dry weather increased moisture demands of newly planted rice.

10 - AUSTRALIA

Dry and warm weather prevailed for most of January, stressing eastern summer crops. Rains during early February brought some relief, but further rains are still needed.

WEATHER BRIEFS

MADAGASCAR: CYCLONES CAUSE MAJOR FLOODING AND CROP DAMAGE

Cyclone Geralda struck the east coast of Madagascar near the port city of Toamasina on February 2, 1994, packing winds of 110 knots. On February 1, prior to making landfall, estimated maximum winds were as high as 140 knots, making this one of the most intense cyclones on record in the South Indian Ocean. The storm weakened during February 3 - 4, but continued to bring heavy rains to the already wet island nation. Two day rainfall totals were 330 millimeters at Toamasina and 369 millimeters at Maintirano on the west coast. Flooding from the storm caused damage to rice and other crops. Rice and plantation crops, as well as infrastructure, had already sustained significant damage from Cyclone Daisy which struck the island on January 13 - 14 and heavy rainfall (50 - 350 millimeters) that occurred during January 16 - 22. Prior to January 1994, Madagascar was experiencing drought.

AUSTRALIA: RAIN PROVIDES SOME RELIEF TO SUMMER CROPS

The sorghum and cotton crops of eastern Australia have suffered this crop year from mostly dry growing conditions. Light-to-moderate rain in amounts of 5 - 30 millimeters fell during the week of January 9 - 15, 1994, in this area. This rainfall ended a period of above-normal temperatures and persistent dryness that had stressed eastern sorghum and cotton. A period of above-normal temperatures returned to this area during January 16 - 29 and again stressed these vegetative crops and decreased reservoir levels. During the week of January 30 through February 5, remnants of tropical cyclone Sadie brought widespread moderate-to-heavy showers (60 - 180 millimeters) to most of this region. A few isolated portions of this summer crop region reported, however, receiving as little as 10 millimeters of rain. This widespread rain benefitted sorghum and cotton which were early in their reproductive stages. Due to inadequate soil moisture, additional rain is still needed across this area.

NORTHWESTERN AFRICA: WINTER GRAIN GROWING CONDITIONS UNFAVORABLE IN EAST

Precipitation was well-below normal across the winter grain growing regions in Morocco, Algeria, and Tunisia during December 1993. Above normal precipitation in October and November 1993 provided moisture in Morocco and western Algeria for germination and early establishment. However, in Tunisia, continued dry weather in December created unfavorable conditions for germination and early growth. During the week of January 9 - 15, 1994, light-to-moderate showers (10 - 47 millimeters) covered eastern Algeria and Tunisia's winter grain areas, providing temporary improvement for crop emergence and establishment. While rains continued to fall almost weekly over portions of the winter grain regions of Morocco and Algeria during the period of January 15 through February 5, Tunisia's northern winter grain area remained unfavorably dry. During February 6 - 10, light-to-moderate rain (10 - 48 millimeters) fell across Tunisia's entire growing region and again provided temporary relief. As of February 10, 1994, topsoil moisture over most of the northwestern Africa's growing regions remains adequate for winter grains in the vegetative stage. However, subsoil moisture remains limited. Timely rain is needed throughout the remainder of the growing season, especially during the critical reproductive period of March and April in order to prevent declines in crop yield potential.

SOUTH AMERICA: SUMMER CROPS FAVORED BY ADEQUATE MOISTURE

Rainfall from October to mid-December 1993 was adequate across South America's summer crop regions. In December, near-to-above normal rainfall covered most of southern Brazil and central Argentina. The rains benefited Brazilian crops, but caused summer crop planting and wheat harvesting delays in Argentina. According to the NOAA/USDA Joint Agricultural Weather Facility, during January 1994, near-to-above normal rainfall continued across central Argentina and favored developing summer crops. Slightly below-normal temperatures helped reduce crop water use. Across southern Brazil, soil moisture has been near optimal, benefiting reproductive corn and soybeans. Rainfall during early February was widespread and moderate (30 - 80 millimeters) in Rio Grande do Sul, Santa Catarina, and western Parana. In Mato Grosso do Sul, Goias, and Mato Grosso, precipitation was lighter; however, sufficient amounts (10 - 50 millimeters) fell benefitting reproductive-to-filling soybeans. Soybeans and cotton in previously dry southern Paraguay, were boosted by showers (20 - 60 millimeters) during the week of February 6 -12, 1994.

PRODUCTION BRIEFS

BRAZIL: SAO PAULO ORANGE CROP FORECAST DOWN BY IEA

The State of Sao Paulo normally accounts for approximately 85 percent of total orange production in Brazil. On January 10, the Sao Paulo Government's Institute of Agricultural Economics (IEA) released its first 1994 orange crop estimate and revised the 1993 production figure. The 1994 Sao Paulo crop (harvested May-December 1994) is forecast at 276.0 to 288.0 million 40.8-kilogram boxes (11.3 to 11.8 MMT), compared to the 1992/93 harvest of 307.0 million boxes (12.5 MMT). Drought last October and November and the spread of the colletotrichum fungus is expected to reduce the average orange yield from 2.0 boxes per tree in 1993 to 1.9 boxes in 1994. IEA is conducting a survey of the Sao Paulo citrus areas in order to assess the number of bearing trees. According to IEA, some trees have been uprooted and the land shifted into sugarcane.

The IEA forecast is similar to the 285.0 million box forecast released by the Brazilian citrus processors in January. The processors revised their 1993 estimate from 285.0, to 302.0 million boxes. The 1993 revision was based on a recount of bearing trees which was revised from 138.0 million, to 146.0 million. The processors estimate includes a small quantity of citrus produced in the neighboring state of Minas Gerais.

ROMANIA: HORTICULTURE PRODUCTION UPDATE

Romania's production of horticultural crops in 1993 was up significantly and continued growth is forecast for 1994 in all but the fruit sector, according to the U.S. agricultural counselor in Sofia, Bulgaria. Currently, the most difficult problems facing Romanian agricultural producers are poor cash flow and high inflation rates.

ROMANIA: PRODUCTION OF HORTICULTURAL CROPS

<u>Crop</u>	<u>1992</u>	<u>1993 1/</u>	<u>1994 2/</u>
	(1,000 Metric tons)		
Fall Potatoes	2,329	3,198	3,441
Field Vegetables	2,518	3,025	3,036
Fruits	1,167	2,183	1,450
Grapes	905	1,339	1,349

1/ Preliminary.

2/ Forecast.

CHILE: WALNUT PRODUCTION CONTINUES TO TREND UPWARD

Walnut production during the 1993/94 season is forecast at 10,000 tons in-shell, up 5 percent from the 1992/93 crop of 9,500 tons, due to favorable weather during the growing season. Growers are anticipating a good-quality crop, barring early rainfall at harvest time (March and April). Chilean walnut

area appears to have leveled off at just under 7,000 hectares, following a steady decline from 7,630 hectares in 1981/82. The downturn over the last decade occurred as aging walnut orchards were replaced with fruits trees that provided higher profits and a more rapid return on investment.

In Chile, walnuts are harvested seven to nine years after planting. The high-risk, long-term nature of walnuts vis-a-vis other horticultural crops is cited by many producers as the principal factor limiting area expansion. In the past two years, declining returns for most deciduous fruits and improved export prices for walnuts have made walnut cultivation a bit more attractive. As a result, planted area increased slightly in 1993/94, to 6,980 hectares. Improved export prices have spurred larger producers to graft trees and replace aging orchards with higher quality, better-yielding varieties.

There are approximately 1,140 walnut producers in Chile, most of whom own small orchards that normally do not produce an export-quality product. Yields obtained by walnut producers range from 1,200 kilograms to approximately 5,000 kilograms of inshell walnuts per hectare at full production. The period of maximum-yields normally begins 16 years after planting. Most walnuts in Chile are of poor quality because the nuts on the trees do not mature uniformly. This prolongs the harvest and increases the risk of mold formation. Walnuts are harvested when they are ripe, which produces a darker kernel than in most Northern Hemisphere countries.

Although walnut trees are planted from the Third Region (Copiapo) through the Ninth Region (Temuco), over 90 percent are planted in the central areas--specifically Region Five (San Felipe-Los Andes), the Metropolitan Region and Region Six (Rancagua). The best quality walnuts usually are produced in Region Five where dry weather during harvesting allows producers to pick a dry, mold-free nut.

CHILE: WALNUT AREA AND PRODUCTION

Years	Planted Area (Hectares)	Production (Metric tons, in-shell)
1981/82	7,630	6,000
1982/83	7,450	6,440
1983/84	7,350	5,900
1984/85	7,300	8,400
1985/86	7,285	5,200
1986/87	7,270	11,200
1987/88	7,165	6,500
1988/89	7,050	10,000
1989/90	6,955	7,100
1990/91	6,952	8,350
1991/92	6,950	8,500
1992/93 1/	6,940	9,500
1993/94 2/	6,980	10,000
1994/95 2/	6,990	11,000
1995/96 2/	7,000	11,200

1/ Preliminary data.

2/ Estimated data.

SOUTH AFRICA: AGRICULTURAL POLICY CHANGES UNDER DISCUSSION

As South Africa prepares to elect a new government on April 27, 1994, the African National Congress-affiliated Land and Agricultural Policy Center and other parties are discussing long-range reforms to improve living standards and reduce government control over the agricultural sector according to the U.S. agricultural attache in Pretoria. One of the proposals is to eliminate the agricultural marketing boards which have played a major role in setting and implementing agricultural policy for many years, as well as ending market restrictions and government controls on agricultural products except in matters of health and hygiene. Some of these ideas have already been implemented by the current government. Most of the agricultural boards are now being privatized, abolished, or scaled down, and South Africa has promised to cut export incentives and internal supports and subsidies to comply with GATT requirements. Another proposal under discussion is to buy some of the large commercial farms that went bankrupt in recent years on a "willing buyer - willing seller" basis and make the land available for resettlement; however, no decision has been made on how to implement the proposal.

SOUTH AFRICA: PROSPECTS EXCELLENT FOR 1993/94 CORN CROP

Prospects are very good for South Africa's 1993/94 corn crop, planted October through December and harvested April through June. Production is estimated at 10.5 million tons, up 1.1 million from last year and the largest harvest in five years. Total area increased this year to an estimated 3.7 million hectares, up from 3.6 million in 1992. The estimated yield of 2.84 tons per hectare is well above the 5-year average, but below the record 3.29 tons per hectare recorded in 1988/89. Pre-season moisture was low and the spring rainy season was delayed a few weeks, but record-breaking rain in October across the Maize Triangle replenished soil moisture. The weather was favorably wet in November, but western sections of Transvaal and Orange Free State experienced periods of warm, hot weather in December, which stressed the emerging crop. Moderate amounts of rain and relatively cool temperatures slowed crop development in January, but moisture conditions during the critical reproduction stage during January and early-February were close to normal, keeping yield potential high.

SPAIN: ALMOND ESTIMATE REVISED DOWNWARD

The 1993/94 Spanish almond crop estimate has been revised downward to 63,000 tons (shelled basis). This represents a 4-percent reduction from the preliminary forecast of 65,300 tons (WAP 9-93) and a 12-percent decline from 1992/93. Kernel quality is good and nut size about average.

Consumers in Spain are purchasing a greater volume of domestically produced almonds this season because of the smaller U.S. almond crop. Consequently, wholesale prices for domestic shelled almonds have increased substantially. In January 1994, the average price per kilogram was about 644 pesetas (\$4.50), more than double the average price in January 1993. Short crops this season in the United States and Italy have helped revitalize Spain's almond sector, while the weakened peseta has allowed domestic producers to raise prices and still compete with higher cost imported almonds.

TURKEY: HAZELNUT ESTIMATE REVISED DOWNWARD

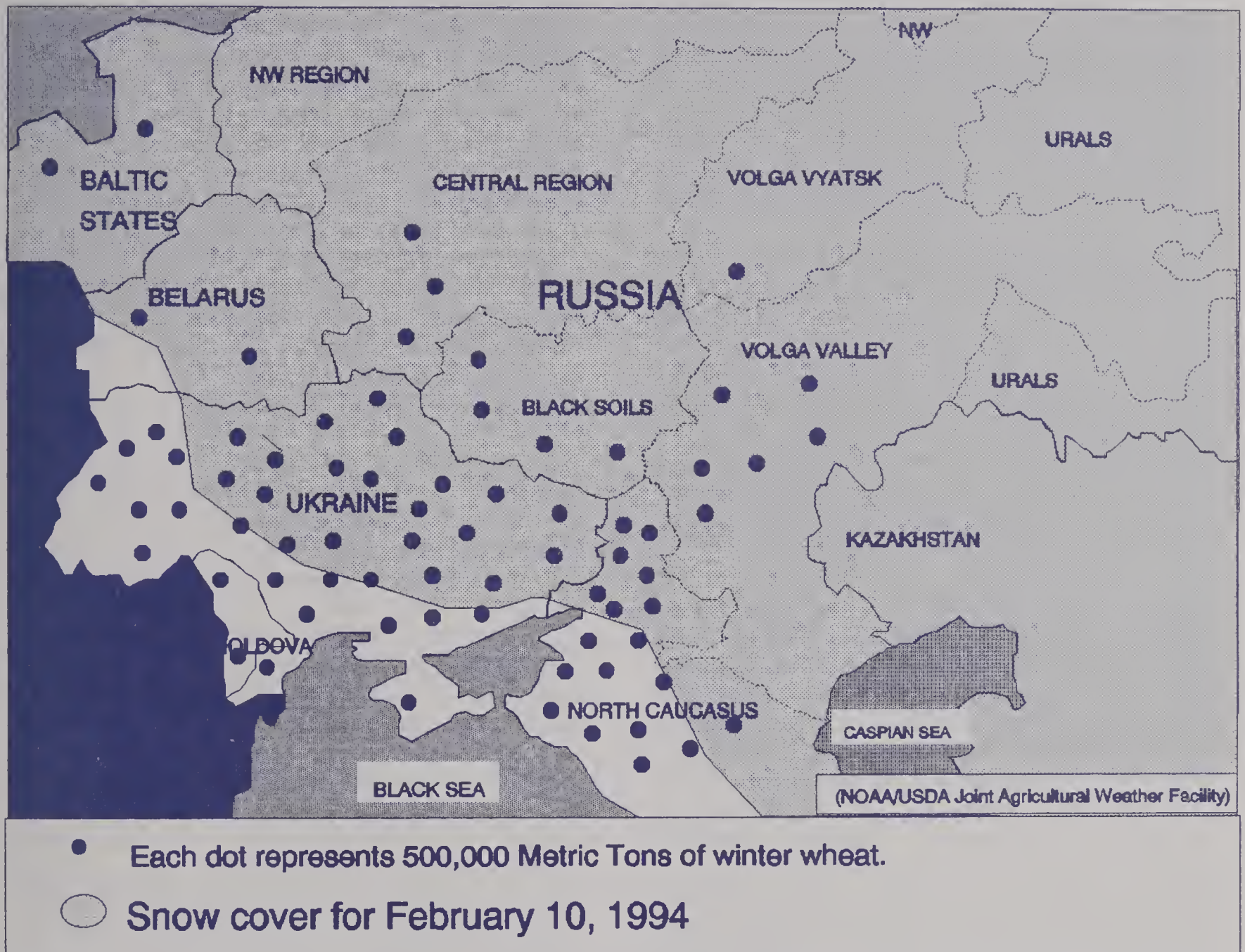
The forecast of Turkish 1993/94 hazelnut production has been reduced 50,000 tons by the U.S. agricultural counselor in Ankara, to 300,000 tons (inshell basis). This is down 50 percent from the record 1992/93 crop of 600,000 tons. This downturn reflects dryer-than-normal weather during the growing season which affected kernel development.

The current domestic price of inshell hazelnuts is approximately \$2.30 to \$2.50 per kilogram, more than double the government support price announced in September 1993. The price increase in Turkey's local markets is following the trend of higher prices in the international market.

FORMER SOVIET UNION: WEATHER AND CROP DEVELOPMENTS

In January, unseasonably warm weather (temperatures 5 to 8 degrees Celsius above normal) prevailed in the Baltic States, Belarus, Ukraine, and Russia. January's mild weather caused some losses in winter hardiness to winter grains, making them more susceptible to potential winterkill in some areas. Precipitation in January was near-to-above normal over the Baltic States, Belarus, and Russia, increasing snow cover. In contrast, below-normal precipitation fell in southern Ukraine. Since early-February, the weather turned sharply colder over the Baltic States, Belarus, northern Ukraine, and Russia, where minimum temperatures ranged from -30 to -15 degrees Celsius. While temperatures approached the threshold for winterkill, a sufficient snow cover minimized the threat of widespread damage.

FORMER USSR - WINTER WHEAT



WEATHER AND CROP HIGHLIGHTS January 12 - February 10, 1994

- o Precipitation was near to above normal except in southern Ukraine where dryness persisted.
- o Unseasonably warm weather in January was followed by bitter cold in early February over most areas. A sufficient snow cover in areas of extreme cold minimized the threat of significant winterkill.

FEATURE COMMODITY ARTICLES

INDICATIONS FOR 1994/95 FOREIGN COTTON AREA

Important factors that influence foreign cotton area include the current cotton market situation, domestic and world financial conditions, government policies, and weather. This season's rising world cotton price is likely to be a significant factor influencing area devoted to cotton in 1994/95. Crop problems in China, Pakistan, and, more recently, in Australia and India are supporting this season's higher prices.

Preliminary indications are that foreign cotton harvested area in 1994/95 could range from 26.0 to 28.0 million hectares, compared with an estimated 26.3 million this year. The high end of the forecast range implies favorable weather, supportive government policies in several large producing countries, and the effect of higher cotton prices. The low end of the forecast range considers the effect of possible area losses due to weather, financial problems, plant disease and/or insect infestation.

China: China's cotton area will most likely increase in 1994/95. This assumes that some North China Plain (NCP) farmers will increase area slightly, while other provinces outside the NCP will have larger increases. Domestic cotton prices were higher in 1993/94 than in 1992/93. The Government has indicated that prices will move higher in 1994/95. This could encourage area increases in Xinjiang in western China, and Hubei and Hunan in Central China where the bollworm infestation is at a very low level compared to the NCP. The major cotton producing provinces in the NCP (Shandong, Hebei, and Henan) may only see a modest increase due to continuing problems with the cotton bollworm. Farmers who were wiped out for the second year in a row will most likely switch to alternate crops, such as corn, soybeans, or peanuts which have attractive prices. Other NCP farmers paid large sums of money for inputs, whose prices rose dramatically during the 1993 growing season. Because of higher costs, these farmers received lower returns, despite fair yields, and may also decide not to grow cotton. Finally, farmers of the NCP that have successfully combatted the bollworm and had good harvests will likely raise their cotton area.

FSU-12: Cotton area for 1994/95 in the Newly Independent States of the former Soviet Union is

expected to decline slightly from this year's estimated area of 2.8 million hectares. As in the past six years, two opposing forces continue to influence cotton area. Each country wants to maintain or expand area to earn hard currency. On the other hand, they also want to provide more food production to feed a growing population. The pressure to reduce cotton plantings comes from the desire to increase the area dedicated to food and forage crop production. In addition to food concerns, they have experienced an increase in land salinity from cotton production, which discourages using more land for cotton. On balance, area is expected to decline modestly, if higher-yielding varieties can maintain or increase production.

Mexico: Indications are that the area planted to cotton for 1994/95 will increase sharply from the 31,000 hectares planted in 1993/94. PROCAMPO (the government's new agricultural income support program) and present higher market prices are two factors providing incentives to growers. The exact level will depend primarily on government price supports, competition from other crops, and financing available to producers.

Brazil: The largest of the three major cotton producing countries in South America, Brazil's cotton area is expected to be up from the 1993/94 season. This projection is based upon area increases in the two largest Center-South cotton producing states of Parana and Sao Paulo. Producer prices are expected to increase in 1994, encouraging producers to increase area. In the Northeast, plantings are not expected to increase due to boll weevil infestations, as well as limited and expensive producer credit. Total 1993/94 Brazilian cotton production is estimated to decline for the second straight year, resulting from low producer prices, shortsighted agricultural policy, and low priced imports. This marks the lowest area and production in 15 years.

Argentina: Argentine cotton area for 1994/95 is forecast slightly lower than the 0.5 million hectares harvested this year. Better returns are anticipated for alternate crops, such as soybean and sunflower because of their lower cost of production. This situation would infer that farmers would reduce significantly their cotton

area; however, cotton producers are employing new cost cutting measures that lower the cost of cotton production. These new techniques are being used by the larger farmers in the cotton areas of northwest Argentina. Cultural practices have improved with the application of agricultural chemicals and fertilizers. Harvest costs also have been reduced with the use of mechanized cotton pickers.

Paraguay: Planting intentions in Paraguay depend on numerous factors, the most important being how well the previous year's crop fared, prices farmers were able to obtain for their cotton, and government incentives to expand area. The 1993/94 area did not reach expected levels because of low government supports, high production costs, and poor performance of the two previous crops. The recent boll weevil infestation in Brazil could negatively affect farmers' decisions to plant cotton in 1994. The 1993 crop will soon be entering the flowering stage and it is at this point that the insect attacks the plant. Insecticides to counter the pests have already been distributed to farmers, but they must be used properly and at the right time to be effective. The outlook for the 1994/95 Paraguayan cotton crop depends to a large extent on the impact of the boll weevil infestation that has affected extensive areas this year.

Cotton area has the potential to grow to 600,000 hectares, under favorable economic conditions. However, this area will not be reached because of the lack of labor for harvesting and the boll weevil threat. Because of this, planted area for the 1994/95 crop is unlikely to exceed 500,000 hectares although it should top the current level of 420,000 hectares.

Pakistan: Cotton area reached a record 2.8 million hectares in 1991/92 and held that level again in 1992/93. In 1993/94, area dropped to 2.7 million hectares due to wide-scale water damage at planting time and a severe virus outbreak later in the season. The area harvested in 1994/95 is forecast to increase slightly. Further expansion in area above the 1992/93 level of 2.8 million hectares seems unlikely at this time as sugarcane area is expanding with an increase in the number of sugar mills.

Production in 1994/95 could increase, particularly compared to the last two years, with favorable weather and timely disease and pest

control measures. Pakistani cotton farmers are generally progressive and alert to new techniques. Production increases are subject to timely control of pests and the virus problem, the evolution of virus-tolerant varieties, adequate fertilizer application, and weather.

About 65 percent of Pakistan's export earnings are from cotton and associated industries. Because of this, the Government is developing a strategy to hold or increase cotton area. At present, the Government is considering a significant increase in the support price for cotton. This would send a positive signal to the farmers to keep land in cotton. The higher price would increase returns and offset cost of production increases.

India: Cotton area has been relatively stable over the past ten years, except for 1986 and 1987 when area dipped below 7.0 million hectares. Otherwise, area has ranged between 7.3 and 7.7 million hectares during the ten-year period. In 1994/95, cotton area may face some competition from soybeans in Maharashtra but this is not expected to result in more than a 50,000 to 75,000 hectare reduction in cotton area. In 1993/94, overall conditions and prices were good and are not expected to cause farmers to reduce cotton area. However, there is little reason to expect that farmers will change their current cropping patterns and expand area dramatically from the current season. Area should remain near the estimated 7.5 million hectares of 1993/94.

Australia: The outlook for Australian cotton production is for a small yearly increase in the area planted to cotton for 1994/95. This reflects cotton's relative price advantage when compared to other production alternatives. However, limited water supply will be more of a constraint for cotton than other farm resources, if the current drought continues in Queensland and New South Wales. This can change with the June to October rainy season that provides water to the reservoirs. If the rainfall is plentiful, then a normal cropping season for cotton is likely with area returning to usual levels for the 1994/95 crop. If this does not occur, as in 1993/94, more efficient use of water could help alleviate some of the water shortage problem and promote increases in plantings. The dry conditions have led to an increase in the planting of less water-reliant dryland cotton. The mix of dryland and irrigated areas is expected to change if the drought continues. Irrigated cotton

acreage was previously forecast to increase due to its profitability. However, the continued shortage of irrigation water, due to a fully committed river and ground-water supply, has increased the planting of dryland cotton.

Turkey: The new cotton production support system of 1993/94 satisfied most farmers and will likely lead to expanded cotton area in 1994/95. The program is similar to the agricultural support system of the European Union and allows the private sector more of a role while reducing that of the government cooperatives. Prices are determined by market forces with the difference between the actual selling price and the officially set target price to be paid to producers by the Government. The new pricing system is an attempt to make Turkish cotton more competitive on the world market. In the Cukurova Region, increased cotton plantings are expected as wheat area is rotated into cotton. The Southeast Anatolian Irrigation Project (GAP) is progressing slowly and is not expected to result in a increase in cotton production in that region during the next crop year.

Egypt: Cotton area for 1994/95 is expected to remain near this year's level of nearly 0.4 million hectares. The static area is in response to the poor performance of the Government's 1993/94 cotton program. The promise of a higher government purchase price for 1993 cotton was not fulfilled and prices paid for the 1993 crop were lower than for the 1992 crop. This has failed to bolster farmers' confidence in the Government's cotton program. The program could not make advance payments to farmers due to inadequate financial resources and resulted in large carry-over stocks. A new cotton program is expected to be ratified following a Presidential Decree and the issuance of Ministerial Decrees to liberalize 1994 cotton production, ginning, and trade. The new cotton procedure and minimum floor price will be announced before the March 1994 planting season.

Greece: Cotton replaced large areas of other irrigated crops in 1993/94 and is expected to continue to dominate among field crops in the upcoming season. Cotton area for the 1994/95 season should remain near the 0.3 million hectares of last season due to comparatively high income and less irrigation water demand. The 1993/94 crop was harvested under excellent weather during September, October, and the first half of November 1993. As of January 1994, approximately 65 to 70 percent of the crop had been ginned.

Cote d'Ivoire: Cotton area for 1994/95 is expected to be unchanged from 1993/94. Last season, the domestic price of seed cotton dropped from the 1992/93 level. This is expected to cause some farmers to decrease cotton area in the coming season or switch to alternative crops. Other factors limiting area expansion are high production costs, the reduction in the number of agents to provide technical assistance, and low market prices. These factors forced the Government to place emphasis on increasing yields rather than on area expansion.

NOTE: Information in this article is based on field reports received in early January 1994 from U. S. agricultural counselors and attaches, together with information from FAS/USDA Washington analysts. The first official USDA forecast of total 1994/95 foreign harvested area will be issued in May. Individual country estimates for area, yield, and production will be released in July of this year.

Ronald R. Roberson, (202) 720-0879

TABLE 20

Foreign Cotton Area, Yield, and Production

Year	Harvested Area (1,000 Ha)	Yield (Kg/Ha)	Production (1,000 Bales*)
1984/85	29,414	560	75,676
1985/86	27,302	534	66,951
1986/87	25,809	513	60,836
1987/88	26,717	541	66,419
1988/89	28,825	522	69,045
1989/90	27,623	533	67,588
1990/91	28,325	549	71,474
1991/92	29,465	579	78,351
1992/93	28,176	514	66,532
1993/94	26,293	522	62,979
5-Year Avg.	27,976	540	69,385
Forecast 1994/95	(26.0 to 28.0)		

*480—pound bales

February 1994

Production Estimates and Crop Assessment Division, FAS, USDA

WORLD RICE PRODUCTION

World rice production for 1993/94 is estimated at 346.8 million tons (milled basis), down 4.6 million or 1 percent from last year. Lower production for the United States, Thailand, Japan, and China more than offset increases in Pakistan, Indonesia, Vietnam, Burma, and India. World harvested area is estimated at 144.0 million hectares, down 1.2 million or 1 percent from last year due primarily to a decrease in China. Global average yield, at 3.57 tons per hectare, is virtually unchanged from last year. (See Table 10 of this circular for area, yield, and production for individual countries and regions.)

United States: Rice production for 1993/94 is estimated at 5.0 million tons, down 0.7 million or 13 percent from last year. Generally favorable spring weather allowed the crop to develop normally. However, excessive rainfall and hot temperatures during the summer reduced yield prospects in Arkansas, Louisiana, and Mississippi. Although the crops grown in the central United States experienced unfavorable weather, the California crop, which represents over 20 percent of U.S. output, is estimated to have bumper yields. The harvest was complete by the end of November.

China: Rice production in 1993/94 is estimated at 127.4 million tons, down 3.0 million or 2 percent from last year and below the record 132.5 million produced in 1990/91. Area is estimated at 30.2 million hectares, down 1.9 million from a year ago, but yield reached a record 6.03 tons per hectare. Chinese officials reported that early rice output was down 4.4 million tons from 1992/93 due to a 10-percent reduction in area and flood damage in parts of southern China. Favorable weather led to larger intermediate and late rice crops in 1993 but the added production was not enough to overcome the early rice losses. Rice is planted in China from April through June and harvested from July through November depending on location and variety (early, intermediate, or late rice).

Rice production in southern China is trending downward. According to the U.S. agricultural counselor in Beijing, farmers are shifting from rice cultivation to cash crops with higher economic returns. In addition, producers are planting more high-quality but low-yielding rice varieties, which have a dampening effect on total output. Harvested area is lower as large fields of rice paddy have been lost to industrial and real estate development, especially near urban areas such as Guangzhou. Also, some farmers have abandoned their land in search for jobs in the booming cities of southern China.

Japan: Production in 1993/94 is estimated at 7.0 million tons, down 27 percent from last year and the smallest crop since World War II. Harvested area rose slightly in 1993 to 2.1 million hectares but unusually cold, wet weather during the growing season caused a drastic reduction in yield. The Ministry of Agriculture, Forestry, and Fisheries reported that in 1993 the national rice crop condition index dropped below 75 (compared to a "normal" crop of 100) for the first time in more than 30 years. The index in some of the hardest hit areas in Hokkaido and northern Honshu dropped below 20 and a few areas suffered a total crop loss. The poor harvest has forced the Government to allow imports of rice to meet domestic demand. Also, Japan has reportedly decided to relax its rice acreage diversion program and expand paddy area in 1994/95 by more than 100,000 hectares in order to increase production and rebuild stocks.

India: Rice production is estimated at 73.5 million tons for 1993/94, up 1.0 million or 1 percent from last year. Area is estimated at 41.2 million hectares, down slightly from last season. In the northern states of Punjab and Haryana, the harvest is complete and production is estimated at near-record levels. July floods led to significant replanting in these states but excellent soil moisture and irrigation supplies permitted normal crop development. Elsewhere in northern India, a break in the monsoon during July/August affected the main transplanting period in many areas, reducing crop area below earlier expectations. The summer crop in Andhra Pradesh is

reported to have declined by 400,000 tons, with area 600,000 hectares below average. Nearly 40 percent of this state's crop is irrigated from tank storage and many farmers hesitated to plant until the winter season. Lower output in this state, however, is projected to be offset by the large crop in northern India. The average yield for India, at 2.68 tons per hectare, is up slightly from the 2.63 tons produced last year.

Bangladesh: Rice production is estimated at 18.0 million tons for 1993/94, virtually unchanged from last season. Harvested area is estimated at 10.0 million hectares, down slightly from last year. Of the three major crops, Aus (harvested during August), Aman (harvested in December), and Boro (harvested in May/June), only the Boro crop is estimated higher than last year. Aus crop area declined 4 percent, while production declined nearly 11 percent. Aus yields declined from reduced fertilizer application rates and flood damage. At planting, rice prices were estimated 25 percent below the previous year, a glut of rice in government storage led to a cutoff in new procurement and crop input subsidies were cancelled, raising the cost of production. Early planting of the Aman crop also coincided with unfavorable prices. Some area previously devoted to high-yielding varieties was sown to local types and reduced fertilizer application rates were reported. Overall good growing conditions, however, prevented a decline in Aman yield from last year's record level. The boro crop was planted under generally favorable conditions. The marketing and crop year, as calculated by the U.S. Department of Agriculture, ends with the Boro harvest.

Pakistan: Production for 1993/94 is estimated at 3.6 million tons, up 0.5 million or 15 percent from last year. Harvested area is estimated at 2.2 million hectares, up 0.2 million from last season. Rice area was reported to have increased in both Punjab and Sindh Provinces this year due to favorable prices, diversion of land from cotton, and recovery of damaged areas following last year's floods. Punjab is the center of Basmati production in Pakistan, while

Sindh is the major producer of IRRI rice. National yields are forecast to rise this year following reports of exceptionally good growing conditions and low levels of pest and disease problems. Fertilizer usage also is reported to be higher than last year. Harvest activity is normally concluded by December.

Thailand: Rice production is estimated at 12.2 million tons, down 1.0 million or 7 percent from 1992/93. The main-season crop is virtually harvested and represents over 90 percent of total production. As a result of inadequate rainfall in most provinces along the Chao Phaya River system, production for the main-season crop was reduced from last year's level. The second season crop, which is nearly 70 percent irrigated, is currently being planted. The Thai Government is encouraging farmers to reduce plantings of second-crop rice due to low reservoir levels. The Agriculture Ministry has created the "Second Rice Crop Reduction Program", in which the Government will supply free alternative crop seeds as well as fertilizer to farmers in the 11 provinces along the Chao Phaya system. In addition, the Government will drill tube wells for farmers agreeing to produce replacement crops and penalize those who join the program but continue to plant second crop rice. Last year, the Government target area for the second crop was 0.34 million hectares, but actual area was 0.71 million hectares. The 1993/94 target area is set at 0.48 million hectares.

Indonesia: Rice production is estimated at a record 31.3 million tons, up 0.6 million or 2 percent from last year. Harvested area is estimated to climb to a record 11.3 million hectares, up 3 percent from last season. Throughout Java, the main rice producing island, irrigation reservoirs are at normal levels despite some late season dryness during the last quarter of 1993. Due to a burgeoning population, the Government of Indonesia is striving to increase its self-sufficiency in rice production. Efforts made to achieve this include: (1) improvements in extension efforts on planting intensity; (2) construction of new irrigated rice fields, especially outside of Java; and, (3) lowering post harvest losses which are reported to be 10 percent to 20 percent.

Vietnam: Production is estimated at 14.4 million tons, up 0.2 million or 1 percent from 1992/93.

Harvested area is estimated at 6.4 million hectares, down 2 percent from last season's 6.5 million. The first of Vietnam's three rice crops has matured and harvest activity is virtually complete. Weather associated with the main-season or 10th-month crop was variable with several typhoons hitting the coast, but the overall rainfall pattern was not widespread. Production is estimated to be similar to last year. The winter-spring crop, which is normally about the size of the 10th-month crop, will begin to be harvested in February in the south and June in the north. Yields are about one-third higher than the 10th-month crop. The outlook is favorable for this crop as the Government responds to higher world rice prices and encourages an expansion of production. The summer-autumn crop is estimated to remain stable at about 20 percent of total production.

Burma: Rice production for 1993/94 is estimated at a record 8.5 million tons, up 0.7 million or 9 percent from last year. Harvested area is estimated at 5.3 million hectares, up 8 percent from last season. The U.S. agricultural attache in Bangkok reported an increase in second-crop (dry season) rice area of 0.5 million hectares, a four-fold increase from 1992/93. The bulk of the second crop is situated in the delta areas of Irrawaddy, Pegu, and Rangoon Divisions. This increase is due to an ambitious government program to expand second-crop area to 2.0 million hectares within the next four years. The second crop is irrigated from reservoirs, rivers and creeks, and tube wells.

Timothy Rocke, Grain Chairperson	(202) 720-1572
Nancy Morrison, Southeast Asia	(202) 720-0882
Paulette Sandene, Japan, China	(202) 690-0133
Micheal Shean, South Asia	(202) 690-0135

RUSSIAN 1993 AGRICULTURAL RESULTS

The U.S. agricultural counselor in Moscow reported that Russian production of grains, oilseeds, and most livestock products declined in 1993. Output of sugarbeets, potatoes, vegetables, and milk remained near 1992 levels. Livestock inventories continued to decline. State grain procurements increased over last year despite lower production, and grain imports fell 62 percent.

CROP PRODUCTION AND PROCUREMENT

Grain production for 1993 was reported at 99.0 million tons, including pulses and minor grains, almost 7 million tons below last year (the USDA estimate of Russian total grain production is 96.0 million tons, not including pulses and minor grains). Before the 1993 harvest campaign began, prospects for a bumper crop were high with some estimates ranging as high as 120 million tons. As harvest progressed into the spring wheat region, however, yields declined sharply due primarily to unfavorable weather. Final total-grain yields were slightly above average. Sunflowerseed output reached only 2.8 million tons from 2.9 million hectares, marking the first time in almost 20 years that the yield fell below 1.0 ton per hectare. Production of sugarbeets, potatoes, and vegetables remained generally steady at 25.5 million, 38.0 million, and 10.0 million tons, respectively.

State grain procurements totalled 28.2 million tons in 1993, up 8 percent over 1992 - despite a 6-percent reduction in production. Total wheat procurements were up 22 percent (although higher-grade hard wheat and durum fell sharply). Procurements of barley, oats, and peas were up 30-50 percent and rye was down 22 percent. Sunflowerseed procurements reached 0.4 million tons, only 35 percent of the goal. However, almost 70 percent of

production was contracted directly to processors, compared to 25 percent in 1992. State procurements of sugarbeets totalled 7.4 million tons, 29 percent of production compared to 43 percent in 1992. Roughly 65 percent of production was contracted directly to processors (rather than sold to the State), up from 50 percent last year. As recently as five years ago, 90 percent of sugarbeet production was procured by the State.

WINTER CROP SEEDINGS

Seedings of 1994/95 winter grains fell 20 percent from 1993/94, to 14.3 million hectares, marking the second consecutive year of declining sown area. Fall plowing for spring crops was down 13 percent, at 41.9 million hectares. A reduction in fall plowing and winter grain seeding implies an increased work load during the 1994 spring sowing campaign.

PRIVATE FARMING

The explosive growth of the number of private farms over the last two years has levelled off. By the end of 1993, Russia's 270,000 private farms occupied 11.5 million hectares, including 10.4 million agricultural and 7.5 million arable hectares. The average size is 42 hectares, but more than half have less than 20 hectares. The number of private farms increased by 87,000 in 1993, but the rate of growth had dropped sharply by the end of the year. The "first wave" of privatization has subsided, as allocations reached the level initially earmarked for distribution to private farmers. Private farmers are also facing cash shortages which make purchases of equipment and supplies increasingly difficult. In 1993, private farms produced 5.1 million tons of grain, 5 percent of the total.

LIVESTOCK INVENTORIES

Inventories of hogs, sheep and goats, and total cattle have been declining steadily over the past several years. Except for hogs, these declines were already underway prior to the breakup of the Soviet Union. The reductions have been steepest in hogs and sheep and goats: hog inventories dropped 9 percent from beginning 1993 and are down 26 percent since 1985; the number of sheep and goats declined 10 percent in 1993 and 29 percent since 1985. While the number of total cattle fell from 60.0 million in 1985 to 49.5 million in 1994 - a drop of 18 percent - the number of cows (included within the total cattle inventory) dropped only 10 percent over the same period to 19.9 million. During calendar year 1993 total cattle inventories fell 5 percent and cow numbers declined less than 2 percent.

LIVESTOCK PRODUCTS

Except for milk, the 1993 output of major livestock products dropped 6-10 percent from 1992. Milk production was reported to be the same at 47.2 million tons. Meat production was down 7 percent (from 8.3 million tons in 1992), eggs were down 6 percent (from 42.9 billion units), and wool output dropped 10 percent (from 0.179 million tons).

Mark Lindeman, (202) 690-0143

TABLE 21

RUSSIA: PRODUCTION AND STATE PROCUREMENT OF TOTAL GRAINS

	Grain Production 1/ (MMT)	Grain Procurement (MMT)	Percent (%)
1987	93.3	35.1	38
1988	88.7	29.2	33
1989	98.9	31.2	32
1990	110.6	34.0	31
1991	85.6	23.6	28
1992	102.4	25.8	25
1993	96.0	28.2	29
Average 1987-92	96.6	29.8	31

1/ Not including pulses and minor grains.

Production Estimates and Crop Assessment Division/FAS/USDA February 1994

RUSSIA: PRODUCTION AND STATE PROCUREMENT OF SUNFLOWERSEED

	Sunflowerseed Production (MMT)	Sunflowerseed Procurement (MMT)	Percent (%)
1987	3.1	2.4	78
1988	3.0	2.3	78
1989	3.8	3.0	78
1990	3.4	2.3	68
1991	2.9	1.8	62
1992	3.1	1.0	33
1993	2.8	0.4	14
Average 1987-92	3.2	2.1	66

Production Estimates and Crop Assessment Division/FAS/USDA February 1994

RUSSIA: PRODUCTION AND STATE PROCUREMENT OF SUGARBEETS

	Sugarbeet Production (MMT)	Sugarbeet Procurement (MMT)	Percent (%)
1987	34.2	29.9	88
1988	32.8	29.6	90
1989	37.4	32.9	88
1990	31.1	25.1	81
1991	24.3	18.7	77
1992	25.5	10.9	43
1993	25.5	7.4 1/	29
Average 1987-92	30.9	24.5	78

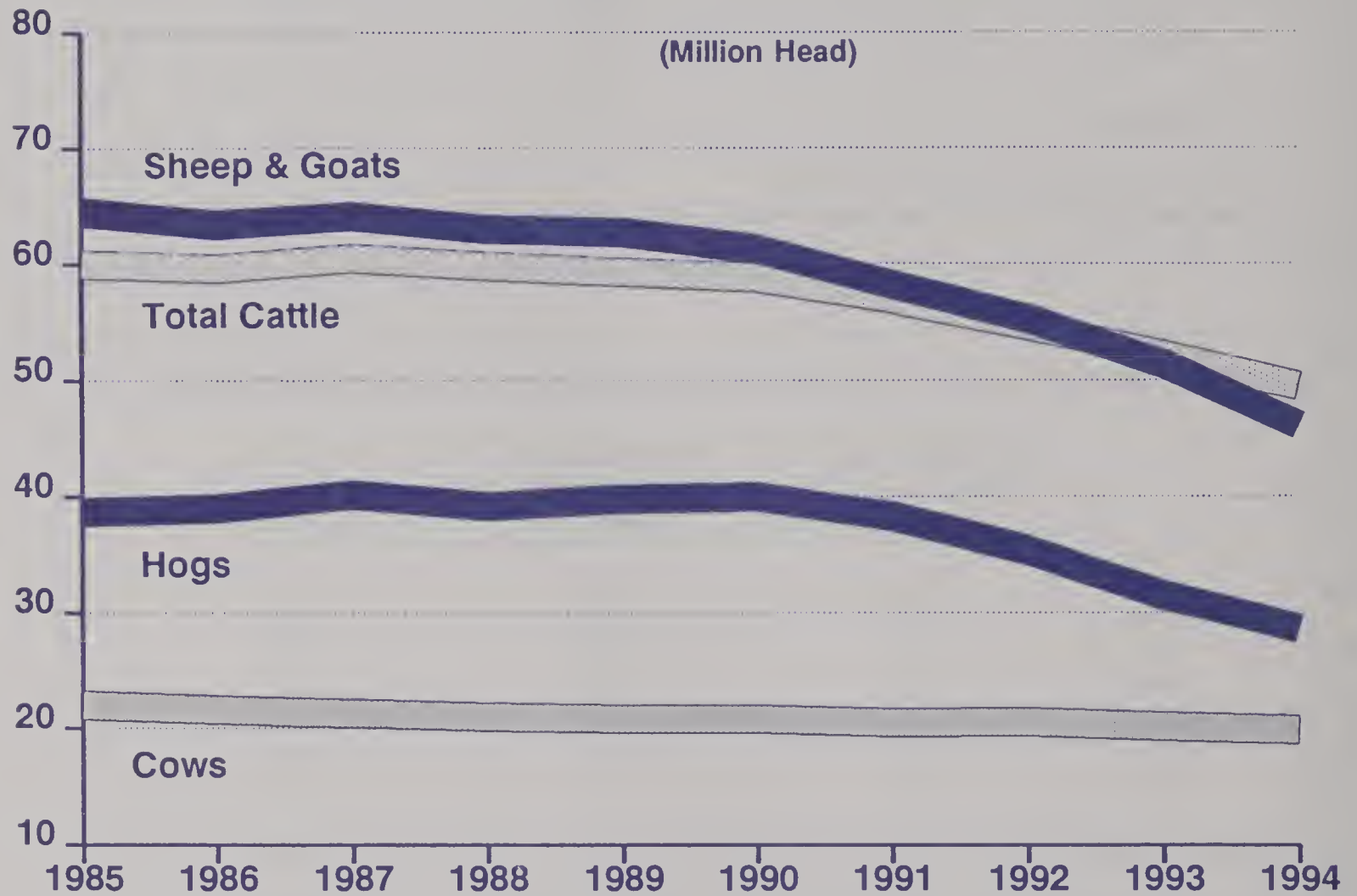
1/ Procurement figure derived; reported as 29 percent of production.

Production Estimates and Crop Assessment Division/FAS/USDA February 1994

CHART 1

Russian Federation

Livestock Inventories As of January 1



February 1994

Production Estimates and Crop Assessment Division/FAS/USDA

INDIAN SOYBEAN PRODUCTION

The following article is derived from a January 1994 report by the office of the U.S. agricultural counselor in New Delhi.

Soybean production in India is expected to exceed 4.0 million tons in 1993/94. Firmly established as the world's fifth largest soybean producer, India will likely soon become the fourth largest soybean meal exporter. India is now a force to be reckoned with in international oilseed meal trade.

Earlier projections that soybean production would not exceed 3.6 million tons before the year 2000 were based on the assumption that area growth would be both modest and largely confined to the state of Madhya Pradesh, and limited by the availability of land left fallow during the monsoon season. However, soybean plantings have been spreading rapidly into neighboring states and have begun to displace coarse grain and pulses in areas where oilseed processing facilities are readily available.

Excellent returns to growers, expanding processing capacity, export demand for soybean meal, and progress in cultivation practices favor further soybean production. Tempering this expansion is competition from other crops, port logistics, and slow soybean varietal improvement. Although high domestic oil prices were clearly an incentive to early expansion of the industry, the current cost-of-production data suggest that area planted to soybeans will likely continue to expand, even if India were to remove all barriers to vegetable oil imports. Under moderate area and yield growth assumptions, production is now forecast to reach 6.3 million tons by the end of the century. As a result, soybean meal exports could exceed 4.0 million tons.

RAPID AREA EXPANSION

Several factors in the late seventies and early eighties stimulated commercial cultivation of soybeans in Madhya Pradesh. These include the promotion of non-traditional oilseed cultivation by the Central Government, provision of cheap production credit, liberal tax relief from state governments to encourage construction of soybean processing plants, high domestic oil prices, and meal export incentives (including now-inoperative export subsidies).

Area expanded initially in western Madhya Pradesh, a region where land was traditionally left fallow during the kharif (monsoon July-October) season due to lack of irrigation, poor soil conditions, and the absence of a kharif crop to plant between the spring harvest of wheat and pulses before the next winter crop in November. Farmers expanded plantings rapidly due to excellent soybean prices. Soybean meal commanded an excellent price in rupee terms in the late 1980's and early 1990's due mainly to strong demand by the Soviet Union. The Soviet Union possessed large quantities of Indian rupees obtained through soft currency trade agreements. High domestic oil prices also contributed to relatively stable rural market soybean prices -- always well above official support prices.

After exhausting most of the available fallow lands in Western Madhya Pradesh by about 1990, soybean cultivation began to cut into the area devoted to less profitable coarse grain crops like sorghum and millet. Those crops faced limited and unstable cash market demand, being grown primarily for local consumption. Farmers who had grown these grains for their own use or for exchange with their neighbors found that they could sell soybeans for cash and feed their families with readily available wheat and rice.

The erosion of food grain and pulse production by soybean cultivation may be making state government officials nervous but the principle that a farmer should be free to plant the crop of their choice is a cornerstone of Indian agriculture policy. With policy makers on the sidelines, the share of soybeans in total kharif planted area in Madhya Pradesh has increased from 8 percent in 1985/86 to 24 percent in 1993/94, while coarse grain and pulse area declined from 33 and 12 to 23 and 10, respectively, during this period. However, the decline in coarse grain production due to area shifts has been partly offset by increased inter-cropping (planting two crops in the same field at the same time) of grains with soybeans, as well as higher yields resulting from the increased use of coarse grain hybrids.

Oilseed processors also have encouraged the spread of soybean cultivation beyond Madhya Pradesh by moving their plants closer to ports and building new plants in Rajasthan and Maharashtra.

Uttar Pradesh initially showed great promise for soybean cultivation but has suffered mainly from a lack of processing infrastructure and the state's distance from major seaports. In Tamil Nadu, a private processing firm helped increase soybean production, both as an inter-crop with sugarcane and as a catch crop on rice fallow land. The attempt by another oilseed processing company to promote soybean cultivation in the southern state of Andhra Pradesh met with limited success as farmers prefer to grow sunflower seed, which is also quite profitable.

Although the State of Gujarat would appear to be strategically located for soybean cultivation due to its proximity to the major soybean meal exporting ports of Kandla and Bedi, the local preference for peanuts and frequent state restrictions on the movement of oilseeds and oils outside the state have discouraged the expansion of soybean cultivation. A few processors who have set up plants in Gujarat are bringing in soybeans from other states for crushing.

Soybean area has increased nearly 150 percent over the past 5 years. If this pace were maintained, India would reach what many consider to be the limit of area suitable for soybean cultivation of 8.0 million hectares in three years. This area and a yield of 1.5 metric tons per hectare, which many in the industry see as easily achievable, would push Indian soybean production to 12 million tons by 1996 or 1997. This forecast is regarded by the USDA as highly optimistic, although some level of additional output growth appears likely.

YIELDS ON THE RISE

Average soybean yields have risen about 10 percent since 1988/89 and are expected to continue at about this rate over the next five years. While many in Madhya Pradesh view 0.8 metric tons per hectare as a minimum yield, even during a below-average (but not disastrous) monsoon, major increases from current average levels of 1.0 tons per hectare are not expected except by some optimistic researchers and cooperative officials who insist that an industry average of 1.5 tons per hectare is readily achievable. A yield trend of about 3 percent growth rate per year (with substantial year-to-year variation due to rainfall conditions) seems more likely, with most of the growth coming from improved management practices. The area of

soybean production is relatively compact by Indian standards and much of the area is similar in soil type. This makes the job of disseminating extension advice to farmers relatively easy. Along with state government agricultural extension services, private processing companies also are working with farmers to improve cultivation practices. Improved handling and application of rhizobium inoculant in the marketing chain have been an important area of progress in recent years.

Quality seeds for planting may be among the most important constraints to future yield growth. While there are efforts underway at both the private and government level to improve the quality of seeds, no breakthrough in productivity appears to be at hand. Yields with current seed varieties have reached 1.8 tons per hectare in farmer field trials, but these were under very intensive farming practices from the standpoint of both labor and inputs.

The common practice of inter-cropping -- where a farmer mixes soybean and coarse grain crops in the same field, has helped farmers become familiar with soybean cultivation without completely sacrificing the production of fodder and staple food. This practice limits yields, however, as soybeans must compete with the primary crop for sunlight, water, and nutrients.

The need for irrigation is often mentioned as a major constraint to yields in Madhya Pradesh and surrounding states. Surface and ground-water irrigation resources are scarce in this region and no major new irrigation projects are within sight of implementation. Normal monsoon rainfall in Madhya Pradesh, east Rajasthan, and central Maharashtra ranges between 29 to 35 inches. Growing areas would certainly benefit from better distribution of rains through the year, and during the monsoon; however, moisture during the growing season is more than adequate in an ordinary year. If dependable irrigation was available (along with the usual highly subsidized water prices), farmers might quickly turn away from soybeans to a wheat-rice rotation or to sugarcane.

PRICES RECEIVED BY FARMERS

High-end projections of future soybean output growth assume that the farm price of soybeans will remain high relative to prices of alternative

rainfed crops, but continued expansion of oilseed cultivation could negate this assumption. With the onset of the record 1993 harvest, soybean prices fell as low as rs. 6,500 per ton (US\$5.60 per bushel) from rs. 9,400 per ton (US\$8.10 per bushel) prior to harvest. Prices have recovered in recent weeks and never fell to the support price of rs. 5,800 per ton. In the future, steeper harvest season price declines are possible.

A conservative projection of future yield and production costs -- with average yield maintaining their current trend and costs rising at 6 percent per year, the break-even price will be about rs. 6,280 per ton for the 1999 crop. A more optimistic projection uses a trend line forecast for production costs and a 5-percent annual yield increment. This produces a break-even farm price of rs.3,820 ton (US\$3.30 per bushel) for the 1999 crop. In each scenario, there is considerable room for downside price movement before soybean production becomes unprofitable.

PRICING AND ALTERNATIVE CROPS

The question of when soybeans become less attractive than alternative crops is more complex. The cost of growing soybean as a cash crop is estimated to be three to four times more profitable than sorghum. As long as relative prices of oilseeds and grains maintain their current relationship, soybean area should not decline in favor of sorghum and millet. Considering the very limited extent to which soybeans have been able to displace other commercial crops, such as cotton, rice, and sugarcane, those crops appear at least as attractive as soybeans at current prices in locations where soil and water conditions permit their cultivation.

GOVERNMENT POLICY

While the government of Madhya Pradesh has turned a blind eye to the expansion of soybean area so far, it is possible that other states could try to limit production if soybeans or other cash crops cut too far into area planted to traditional food crops such as millet and pulses. This could not be done by fiat, since, with few exceptions, farmers are free to plant whatever crop they like. One method of discouraging further growth in soybean cultivation would be to stop licensing the construction of additional extraction mills. However, such a decision would not have an immediate impact since current crushing capacity

already exceeds available supplies. Moreover, many state officials are generally well disposed to the present mix of crops that make a positive contribution to rural cash income and soybeans fit this description. Today the villages in the soybean area of Madhya Pradesh are full of motor scooters and television antennas.

STATE-BY-STATE SOYBEAN OUTLOOK

As the availability of fallow area has been exhausted, future expansion will have to come at the expense of other, possibly more profitable, crops. Sorghum, pulses, and millet will continue to provide the least resistance to expansion. State-by-state projections follow:

Madhya Pradesh: The period of explosive expansion is over but continued area growth is likely. In the western part of the state, new soybean plantings will replace sorghum, millet, and pulses that now cover 3.3 million hectares. Soybeans are expected to replace these crops at the rate of 100,000 hectares annually over the next three years, then slow to 50,000 hectares annually through the year 2000. The Soybean Processors Association is promoting the production of soybeans in eastern Madhya Pradesh which is a traditional rice growing area.

The hilly area of this region receives a great deal of rainfall, while the low-lying areas also provide good conditions for rice production. Soybeans may be more profitable on uplands, although rice is a staple food in this area.

Maharashtra: Soybean growing conditions are best in the sugar-growing areas in the northern part of the state. Soybean area has expanded thus far at the expense of rainfed cotton, chilies, pulses, and coarse grains. Several new soybean processing facilities have been built and this should encourage further increases in production. One advantage with soybean cultivation is that it requires fewer inputs and less intensive management than cotton. If increases in input costs exceed current expectations then it is possible that more farmers would shift out of cotton. However, a major diversion of cotton area to soybeans is not expected. Soybean area is likely to expand by 100,000 hectares over the next three years.

Rajasthan: The lack of irrigation in this dry state will limit future expansion to current production

areas in the southeastern part of the state where rainfall is higher. Some expansion could occur in the north, around Ganganagar, where there are irrigation facilities, but this is predominately a cotton-growing area and access to oil processors is limited. The state also is dependent on millet as a food and feed grain. An annual increase of 60,000 hectares of soybean is forecast for the next six years.

Others: Except for Andhra Pradesh, soybean expansion in other states will likely expand slowly, at a modest rate of 20,000 hectares annually the next five years. In Andhra Pradesh, current area is estimated at about 5,000 hectares, but it's east coast ports and their proximity to Southeast Asia

makes it a likely candidate for soybean expansion. Soil types in the northern part of the state are similar to those in other major soybean producing states. Efforts have been made by one of the largest oilseed processing companies in India to promote soybean cultivation in the state, however, farmers prefer to grow sunflowers rather than soybeans. It is possible that their preference may shift away from sunflowers, if it is demonstrated that soybean cultivation proves more profitable.

India Soybean Area, Yield, and Production*

<u>Year</u>	<u>Area</u> (MHa)	<u>Yield</u> (Mt/Ha)	<u>Production</u> (MMT)
1983/84	0.84	0.77	0.61
1984/85	1.24	0.76	0.96
1985/86	1.34	0.76	1.02
1986/87	1.53	0.58	0.89
1987/88	1.54	0.53	0.89
1988/89	1.73	0.89	1.55
1989/90	2.25	0.80	1.81
1990/91	2.56	1.01	2.60
1991/92	2.82	0.81	2.28
1992/93	3.67	0.85	3.11
1993/94f	4.40	1.02	4.50

* Source: USDA official data base, February 1994

For additional information contact:
Rod Paschal, (202) 720-0881

CHART 2

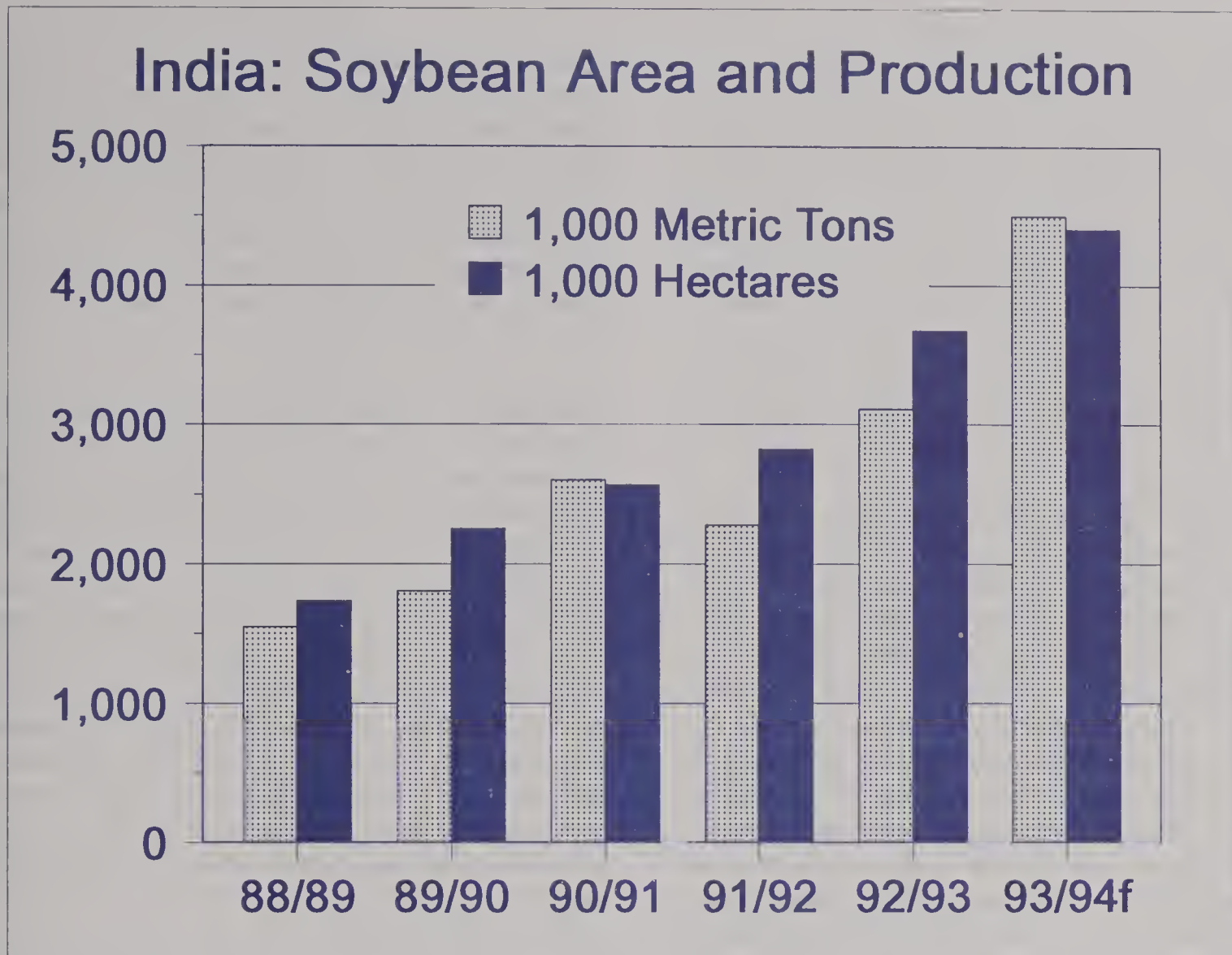
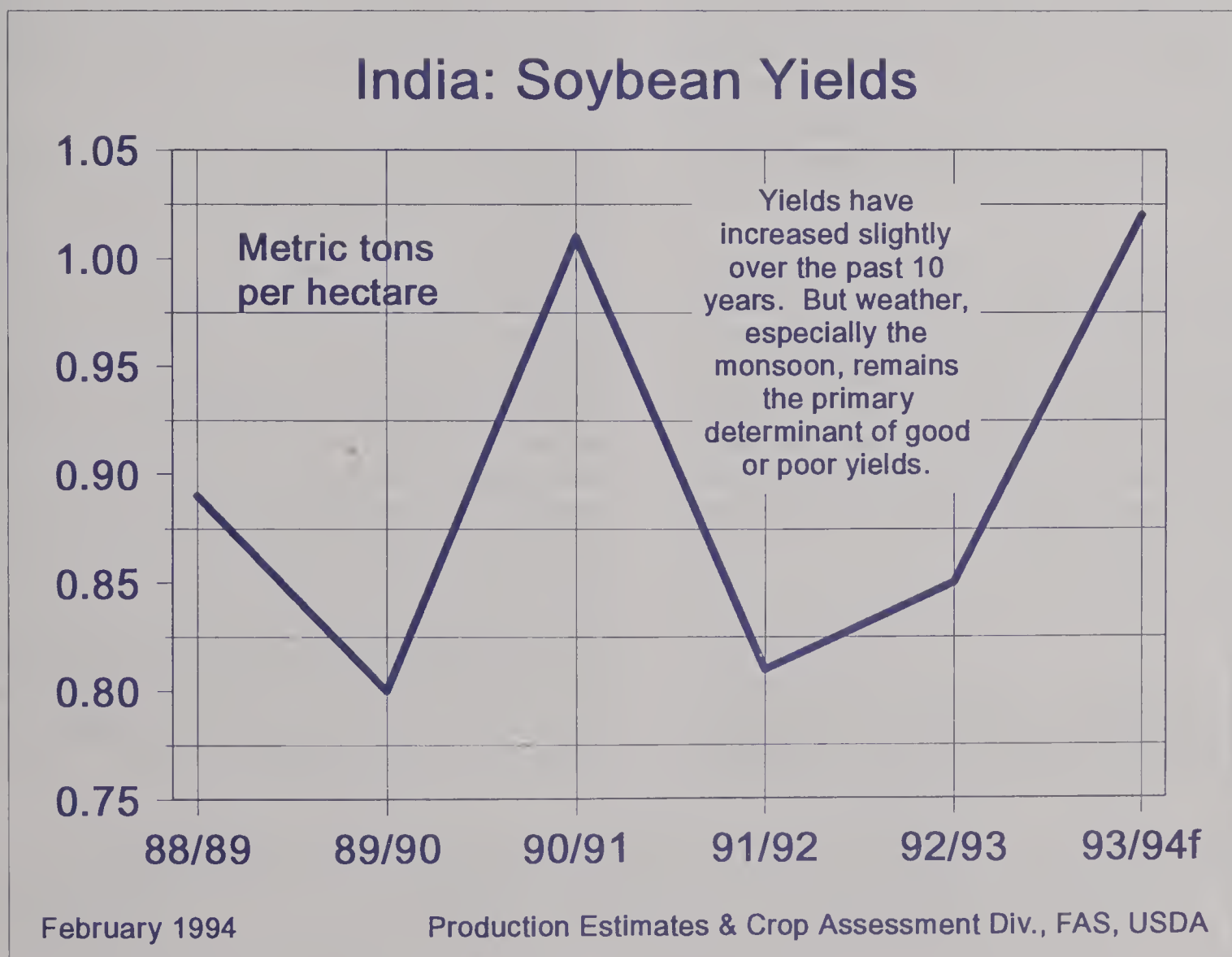


CHART 3



DECIDUOUS FRUIT AND TABLE GRAPE SITUATION

Following the record-breaking output of 1992/93, production of apples and pears by the world's leading commercial producers in the Northern and Southern Hemispheres is expected to drop to near-normal levels during the 1993/94 season. Apple production is estimated at 29.9 million tons, down 6 percent from 1992/93. Pear production is estimated at 5.3 million tons, an 11-percent decrease from last season. Table grape production totaled 4.9 million tons in 1993, slightly higher than production in 1992.

Besides revising 1993/94 estimates for several Northern Hemisphere producers, three additional Northern Hemisphere countries have been added to the apple production table -- Bulgaria, Russia, and China. All three are considered significant producers of apples and their inclusion provides a better picture of world production. Bulgaria and Russia are currently facing production problems due, in part, to the restructuring of their agricultural sectors from public to private. Bulgaria, with complicated land reforms and a severe drought in 1993, registered a 29-percent decline in apple production, to 155,000 tons for the 1993/94 season. Production in Russia for 1993/94 is forecast to decline 4 percent, to 1.2 million tons, due to a reduction in orchard area and falling yields brought about by rising input costs. However, China, with estimated apple production of 7.1 million tons in 1993/94, continues to harvest successively bigger crops and is now the world's largest single-country producer.

Apple production in selected Southern Hemisphere countries for 1993/94 is forecast at a record 3.3 million tons, 6 percent above 1992/93. Southern Hemisphere pear production is projected at 1.1 million tons, up 6 percent from 1992/93. Preliminary estimates indicate that table grape production in the Southern Hemisphere will increase 3 percent in 1994, to a record 1.1 million tons.

APPLES

The five commercial producers in the Southern Hemisphere are expected to harvest a record 3.3 million tons of apples during the 1993/94

season (crop harvested in early-1994), slightly surpassing the previous record set in 1991/92. Production in Argentina is expected to rebound from the weather-reduced crop of 1992/93, thereby reestablishing Argentina as the largest apple producer in the Southern Hemisphere. New Zealand and South Africa are both forecast to have record crops, while production in Chile is forecast down slightly.

Argentina: Apple production in 1993/94 is forecast at 1.0 million tons, 25 percent above the frost-reduced crop of 1992/93. Light frosts affected some fruit during the flowering stage, but damage was minimal. According to producers in Argentina's Rio Negro and Neuquen provinces, this year's apple production could exceed the forecast by 15 percent. However, slack foreign and national demand may leave marketable fruit unharvested. Producers report that there are still apple stocks from last year's crop in controlled-atmosphere storage and that the industry is in no position to absorb more fruit than last year, because of low international prices.

Chile: As a result of excellent weather during the winter, budding was good which should yield an excellent quality crop in 1993/94. However, production is forecast down 5 percent, to 810,000 tons, because output of red-variety apples is off from last year.

Although there are a total of 43 apple varieties in Chile, Red Delicious apples and their variations (e.g., Richardred, Starking, etc.) predominate. Around 70 percent of the varieties are red apples and are primarily produced for European and Middle Eastern markets. The green variety, Granny Smith, is grown for export to Europe and the United States, as well as for concentrated apple juice production. Lately, production of some of the varieties new to Chile, such as Fuji, Gala, Jonathan, and Black Jon, has been expanding.

Although some new orchards have been planted during the last few years, Chile's expanding apple output primarily can be attributed to trees reaching more mature bearing stages and increasing tree densities within existing

orchards. Older orchards are being replaced, mostly with the new varieties.

South Africa: South Africa's 1992/93 apple crop of 597,400 tons fell short of the early-season forecast of a record 602,000 tons and was marginally less than the 1991/92 crop. However, the forecast for 1993/94 is a record 630,000 tons, mainly due to an abundance of newly maturing trees. UNIFRUCO, South Africa's fresh fruit export organization, is still advising farmers to expand production but with strong varietal recommendations. The push is to produce Royal Gala and other bi-colored apples in order for these varieties to reach 20 percent of total exports. Exports are currently dominated by the green Granny Smith apple.

New Zealand: The outlook for the 1993/94 crop is a marginal 2-percent increase, to 497,000 tons, compared to a 10-percent increase in 1992/93. The slow-down in production growth was due to a decline in planted area and a hail storm in the Hawkes Bay growing district at fruit set in early-November. These factors nearly negated the production increase anticipated this season from maturing orchards planted to the Braeburn, Royal Gala, Cox, and Fuji varieties.

Australia: Apple production during 1992/93 totaled 340,000 tons, up 5 percent from 1991/92. Favorable seasonal conditions, an increase in bearing tree numbers, and improved yields from maturing orchards helped boost production. The 1993/94 crop is forecast to decline 6 percent, to 321,000 tons, due to flooding, hail, and high winds in Victoria's Goulburn Valley.

A number of Australia's old and poorly managed orchards have been replaced recently. The new plantings are mainly superior dwarf rootstock--planted up to three times the density of the old rootstock--and will produce fruit earlier than traditional varieties. Red Delicious and Granny Smith varieties are still very popular and continue to be planted. However, the new varieties, mostly Fuji and Gala, are rapidly taking hold. By the 1998 season, bearing tree numbers are projected to increase 7 percent, to 5.1 million.

PEARS

Pear production in the Southern Hemisphere for the 1993/94 season (crop harvested in early 1994) is projected at 1.1 million tons, up 6 percent from 1992/93. Production in the four largest pear-producing countries -- Argentina, South Africa, Chile, and Australia -- is forecast to increase in 1993/94, while production in New Zealand remains stable.

Argentina: The 1992/93 estimate was revised upward to 370,000 tons, 4 percent below the previous year, but higher than the initial estimate which reflected a 26-percent decline due to frost damage. Production in 1993/94 is forecast at 400,000 tons, up 8 percent from 1992/93, as good weather prevailed during the critical growth stages. Assuming normal weather at harvesting, fruit quality should be average.

South Africa: Pear production in 1992/93 reached a record 250,000 tons, 11 percent over 1991/92, although quality was poor because of dry weather. As a result, both domestic and export sales increased due to lower prices. The 1993/94 crop is forecast at a record 269,000 tons.

Chile: Pear production is forecast at a record 232,000 tons in 1993/94, an increase of 10 percent from the previous year. Pears are one of the few deciduous fruit crops in Chile where production is still expanding rapidly. Additionally, at least 40 percent of planted area is still in immature-yield stages of production.

There are over 36 pear varieties grown in Chile. Packham's Triumph and Beurre Bosc make up 45 percent and 25 percent of Chile's exports, respectively. Bartletts, Beurre d'Anjou, and Winter Willis are other important varieties. Asian or sand pears account for 11 percent of total planted area. However, acceptance of this variety in the U.S. market has not been as strong as expected. As a result, industry sources expect continued replacement of sand pears with European pear varieties or other deciduous fruits.

Australia: Pear production in 1992/93 dropped 9 percent to 171,000 tons. The decline was due to hail damage, black spot disease, and the

removal of older trees. Bartlett and Packham varieties still dominate production in Australia. However, newer varieties are becoming popular, such as Beurre Bosc, Josephine, and Nashi.

Violent weather--including severe storms and flooding--also has plagued the 1993/94 crop. Although flooding will most likely result in smaller fruit, there may also be some trees lost due to root disease. Additionally, fruit quality is expected to suffer because of hail damage early in the season. Despite the quality problems, the 1993/94 "on-year" crop is forecast at 176,000 tons, up 3 percent from last season and moderately above the previous 5-year average of 167,000 tons.

TABLE GRAPES

The 1994 forecast for Southern Hemisphere table grape production is 1.1 million tons, 3 percent higher than the 1993 level. All three Southern Hemisphere producers are forecasting crop increases during 1994.

Chile: Production of table grapes is forecast to increase slightly in 1994, to 860,000 tons. Table grape planted area has reached a stable level in Chile. New plantings are expected to occur only when aging orchards are replanted or new varieties are introduced that better reflect market demand. Continued growth in output for the next two to three years is projected--a result of increasing yields as additional areas reach mature production stages. Based on the average age of Chile's table grape plantings, production could begin to decline after 1996 or 1997 unless significant plantings take place during the next few years.

South Africa: Production of table grapes in 1993 declined for the first time in five years, to 116,075 tons, mainly due to dry weather and market factors. Recovery is anticipated in 1994 with production forecast at a record 133,000 tons.

Argentina: Table grape production for 1994 is forecast at 120,000 tons, up 9 percent from the frost-reduced 1993 crop, but still below the previous 5-year average of 140,000 tons. Since there is no national or provincial government support of the table grape industry, production depends heavily on weather, demand, and export potential.

Kelly A. Kirby, (202) 720-6791

APPLE PRODUCTION – Selected Countries

(1,000 Metric tons)

	1991/92	1992/93	1993/94 1/
NORTHERN HEMISPHERE			
NORTH AMERICA			
Canada	513.3	545.5	482.0
Mexico	550.0	580.0	490.0
United States	4,412.9	4,798.4	4,812.6
Total	5,476.2	5,923.9	5,784.6
EUROPEAN UNION:			
Belgium/Luxembourg	139.0	492.1	530.2
Denmark	55.0	83.0	80.0
France	1,235.9	2,398.0	1,972.0
Germany	1,164.8	2,951.0	1,679.0
Greece	180.0	350.0	330.0
Italy	1,868.8	2,368.0	1,994.0
Netherlands	223.0	570.0	570.0
Spain 2/	516.8	1,026.9	884.9
United Kingdom	285.6	337.0	338.0
Total	5,668.9	10,576.0	8,378.1
OTHER EUROPE:			
Austria 2/	243.2	232.5	295.7
Bulgaria	145.1	217.5	155.0
Hungary	859.0	666.0	600.0
Norway	50.8	45.0	50.2
Sweden	54.1	71.7	80.0
Turkey	1,900.0	2,100.0	2,000.0
Total	3,252.2	3,332.7	3,180.9
Russia	1,480.0	1,210.0	1,160.0
Total Europe	10,401.1	15,118.7	12,719.0
ASIA:			
China	4,540.0	6,556.0	7,100.0
Japan	760.3	1,039.0	1,027.0
Taiwan	16.9	12.6	5.5
Total	5,317.2	7,607.6	8,132.5
TOTAL NORTHERN HEMISPHERE	21,194.5	28,650.2	26,636.1
SOUTHERN HEMISPHERE 3/			
Argentina	1,043.0	800.0	1,000.0
Australia	324.0	340.0	321.0
Chile	840.0	850.0	810.0
New Zealand	443.4	488.8	497.2
South Africa	598.7	597.4	630.0
TOTAL SOUTHERN HEMISPHERE	3,249.1	3,076.2	3,258.2
WORLD TOTAL	24,443.6	31,726.4	29,894.3

1/ Preliminary. 2/ Does not include apples produced exclusively for processing. 3/ For Southern Hemisphere countries, data refer to crops harvested in the second year indicated.

TABLE 23

PEAR PRODUCTION – Selected Countries

(1,000 Metric tons)

	1991/92	1992/93	1993/94 1/
NORTHERN HEMISPHERE			
NORTH AMERICA			
Canada	18.4	19.7	16.0
Mexico	30.0	32.0	32.5
United States	819.7	840.1	847.5
Total	868.1	891.8	896.0
EUROPEAN UNION:			
Belgium/Luxembourg	68.0	112.0	147.0
Denmark	5.7	8.0	8.2
France	224.0	393.6	226.0
Germany	225.3	578.9	370.0
Greece	64.1	88.1	85.0
Italy	770.5	1,264.0	930.0
Netherlands	96.0	101.0	150.0
Spain 2/	387.3	601.5	465.1
United Kingdom	38.1	25.9	43.1
Total	1,879.0	3,173.0	2,424.4
OTHER EUROPE:			
Austria 2/	36.2	35.9	44.0
Norway	4.1	4.7	3.9
Sweden	7.6	9.4	10.3
Turkey	403.0	420.0	410.0
Total	450.9	470.0	468.2
Total Europe	2,329.9	3,643.0	2,892.6
ASIA:			
Japan	434.5	429.1	421.6
TOTAL NORTHERN HEMISPHERE	3,632.5	4,963.9	4,210.2
SOUTHERN HEMISPHERE 3/			
Argentina	386.5	370.0	400.0
Australia	187.0	171.0	176.0
Chile	182.0	210.0	232.0
New Zealand	17.6	18.5	18.5
South Africa	235.0	260.0	269.0
TOTAL SOUTHERN HEMISPHERE	1,008.1	1,029.5	1,095.5
WORLD TOTAL	4,640.6	5,993.4	5,305.7

1/ Preliminary. 2/ Does not include pears produced exclusively for processing. 3/ For Southern Hemisphere countries, data refer to crops harvested in the second year indicated.

February 1994

Production Estimates and Crop Assessment Division, FAS, USDA

TABLE GRAPES – Selected Countries
(1,000 Metric tons)

	1991	1992	1993	1994 1/ 2/
NORTHERN HEMISPHERE				
France	70.4	79.8	107.0	N/A
Greece	373.7	325.2	368.0	N/A
Italy	1,410.8	1,678.0	1,650.0	N/A
Japan	270.6	276.1	279.3	N/A
Mexico	345.0	285.0	270.0	N/A
Spain	461.6	428.9	396.3	N/A
United States	726.1	697.6	705.2	N/A
Total No. Hemisphere	3,658.2	3,770.6	3,775.8	N/A
SOUTHERN HEMISPHERE				
Argentina	160.0	150.0	110.0	120.0
Chile	795.0	795.0	855.0	860.0
South Africa	112.2	127.1	116.1	133.0
Total So. Hemisphere	1,067.2	1,072.1	1,081.1	1,113.0
WORLD TOTAL	4,725.4	4,842.7	4,856.9	N/A

1/ Preliminary. 2/ NA = not available until October 1994.

February 1994

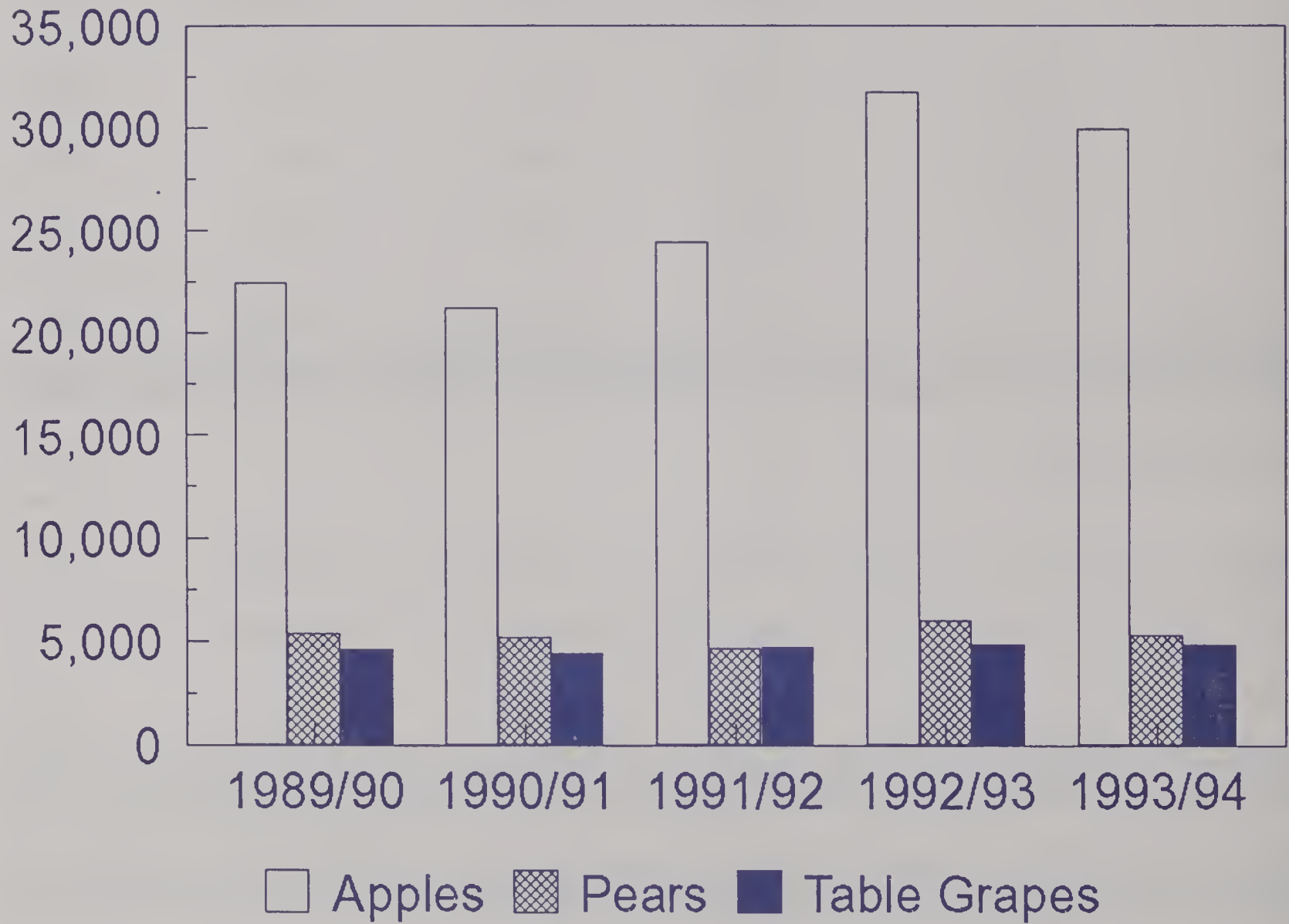
Production Estimates and Crop Assessment Division, FAS, USDA

CHART 4

Apple, Pear, and Table Grape Production

In Selected Countries

(1,000 Metric tons)



CHINA AGRICULTURAL OVERVIEW

China enjoyed a very successful year in agriculture in 1993. The State Statistical Bureau announced that despite a small drop in planted area, total 1993/94 grain production was a record 456.4 million tons, more than 10 million higher than the previous record set in 1990. Chinese officials reported that early rice output was down more than 4.0 million tons from last year due to lower area and yield, but generally favorable weather and the expanded use of hybrids boosted late rice, wheat, and corn output to record levels. Oilseed production hit a record 17.6 million tons in 1993 on the strength of an unusually large peanut crop, while production of meat, dairy products, and eggs all exceeded 1992 levels. Cotton output reached an estimated 4.0 million tons in 1993, down 11 percent from the previous year. Although cotton yields were higher in 1993, production dropped due to a large reduction in area.

The Ministry of Agriculture and the State Council have announced moderate agricultural goals for 1994. The production targets for grain and oilseeds are 450.0 million tons and 17.0 million tons, respectively - similar to the output achieved in 1993. Cotton area is targeted to reach 6.0 million hectares, up from an estimated 5.3 million hectares in 1993, and the cotton production target is 4.8 million tons, up 15 percent from a year ago. The Chinese Government also wants to increase the production of meat, poultry, aquatic products, fruit, and vegetables, especially in suburban areas, and increase the gross value of agricultural output by 4 percent. Two other government goals are to raise farm incomes by 5 percent, compared to the 2 percent increase

in 1993, and to relieve the financial burden on farmers by reducing the number and size of farm levies. These measures are meant to lessen the income disparity between rural and urban areas which has led to rural unrest and contributed to a massive migration of rural labor into the cities.

One of the Chinese Government's long-term agricultural goals is to stabilize grain area at no less than 110.0 million hectares and reduce its annual net loss of farmland to abandonment, residential construction, and industrial development, a trend that has been especially prevalent in southern China. The Government also intends to increase agricultural investment in 1994, especially in central and western China, which have lagged economically behind the more developed areas along the east coast. These programs will focus on improving infrastructure, expanding irrigated areas, reclaiming wasteland, developing new hybrid seeds, and improving the distribution of market information.

CHINA'S AGRICULTURE IS CHANGING

The U.S. agricultural counselor in Beijing reports that China's movement toward a market economy is having an immense impact on the agriculture sector. Last year the Chinese Government officially eliminated grain rationing in the cities, decontrolled the input market, eliminated production subsidies, and started a program to encourage farmers to increase efficiency and improve the quality of their products. Most of the provinces have already implemented these policies and they should be in force nationwide in one or two years. The

new emphasis on markets also is changing land use patterns. Total cultivated farmland is declining as more land is used for residential and industrial purposes. Farmers are now deciding for themselves what to grow based in large part on market signals. There has been a major shift in area away from grain and towards cash crops such as cotton, tobacco, fruits, and vegetables.

These policy changes have not been problem-free. For example, retail prices for grain, edible oil, eggs, and pork shot up as much as 40 percent between October and December 1993, despite more than adequate supplies. A combination of grain shortages in some southern provinces, an inadequate food distribution network, hoarding by farmers waiting for higher prices, panic buying by consumers, and general misinformation about the government's policies all contributed to the price spiral. The Government succeeded in bringing prices back under control by releasing stocks and establishing ceiling prices in Beijing and other areas, but officials have said they hope this level of intervention will be unnecessary once the market system matures.

The following is a production summary for selected crops for 1993/94 and the outlook for 1994/95.

Rice: Production in 1993/94 is projected at 127.4 million tons, down 3.0 million or 2 percent from last year and below the record 132.5 million produced in 1990/91. Area is projected at 30.2 million hectares, down 1.7 million from a year ago, but projected yield reached a record 4.22 tons per hectare.

Chinese officials reported that early rice output was down 4.4 million tons from 1992/93 due to a 10-percent reduction in area and flood damage in parts of southern China. Favorable weather

led to larger intermediate and late rice crops in 1993/94, but the additional production was not enough to overcome the early-rice losses. The forecast for 1994/95 calls for a slight increase in area and stable production. Higher expected prices will stimulate more plantings in some provinces, particularly in northern China where 'japonica' rice is grown, but rice area may continue to fall in areas where farmers can earn higher economic returns from other crops.

Wheat: China produced a projected 105.0 million tons of wheat in 1993/94, setting a new record for the second consecutive year. Wheat area dropped slightly to 30.2 million hectares, with almost all the loss coming out of spring wheat plantings, but excellent weather helped China achieve record yields of 3.48 tons per hectare. The 1992 cotton bollworm outbreak on the North China Plain encouraged farmers to change the way they planted wheat in the fall of 1992 for the 1993/94 crop. Rather than leave room for intercropping with cotton the following spring, as was customary, they decided to aim for higher wheat yields and planted the crop more densely. Wheat production in 1994/95 may be lower than last year with a return to average yields.

Corn: China's 1993/94 corn output is projected at a record 102.0 million tons, up more than 6.6 million tons from last year. Although area decreased by 400,000 hectares to 20.6 hectares, generally good weather led to record estimated yields, especially on the North China Plain. Corn prices in late 1993 have been stable to increasing slightly, which will encourage farmers to plant corn again in 1994. High prices also are increasing acreage in the non-traditional corn growing regions of central and southern China, where the demand for animal feed is very strong.

Soybeans: China's soybean production for 1993/94 is estimated at 13.0 million tons, up 2.7 million or 26 percent from last year and up 34 percent from 1991/92. Higher domestic prices and poor cotton prospects encouraged farmers to increase soybean area to 9.3 million hectares, up more than 2 million from last year. Good weather in key soybean-producing provinces resulted in a yield of 1.40 tons per hectare, slightly higher than last year and above the 5-year average. The U. S. agricultural attache in Beijing reported that farmers on the North China Plain planted more soybeans rather than cotton and corn in 1993, and mostly favorable weather led to high yields. Planted area may fall back to more normal levels in 1994, but soybean production is expected to remain high in response to positive market signals.

Sorghum: Sorghum area rose slightly in 1993/94 to 1.3 million hectares and production reached a projected 5.0 million tons. Production is expected to remain stable or increase slightly in 1994/95 based on continued strong prices and high demand by the feed sector, but the prospects for expansion are limited. Sorghum area has been declining for many years because of competition with more-profitable corn and soybeans for available area.

Millet and Barley: Millet area increased to just over 2.0 million hectares in 1993/94 and production is estimated at 4.2 million tons, close to the 5-year average. Barley area and production in 1993/94 is estimated at 1.2 million hectares and 4.2 million tons, respectively. Most of the barley crop is used to make beer, but output has not kept pace with demand by the breweries. China's beer production continues to rise dramatically, and it is now the world's second largest beer brewer behind the United States. China will increasingly depend on barley imports in the future. Production of millet, barley, and other minor grain crops have been declining in importance for many years, and this trend is unlikely to change.

Cotton: China's 1993/94 cotton area dropped to 5.5 million hectares, down almost 1.4 million from the previous year as farmers, discouraged by the poor harvest in 1992/93, planted soybeans and other competing crops instead of cotton. Although mostly favorable weather and improved pest management led to higher yields in 1993/94, production dropped to an estimated 18.0 million bales (3.9 million tons), down 13 percent from a year ago. The Government has announced higher cotton procurement prices for 1994/95 to encourage farmers to plant more cotton following the poor crops of the last two years. Assuming average yields, production is expected to increase in response to the higher acreage. Cotton is one of the few crops still tightly controlled by the Central Government, which has the sole authority to buy and trade cotton.

Peanuts: Following a drought-reduced crop in 1992, peanut area grew by 12 percent in 1993 to 3.3 million hectares and excellent yields pushed production to an estimated 8.0 million tons, making China the largest peanut producer in the world. Reports from Shandong Province, traditionally the most important peanut producer, suggests that many farmers shifted into peanuts from corn and cotton because of the higher market price for peanuts. Area and yields are forecast to return to more normal levels in 1994.

Rapeseed: Low relative prices for rapeseed led to an 11-percent decrease in area in 1993/94 to 5.3 million hectares. Production dropped to an estimated 6.8 million tons, significantly lower than the bumper crops of the previous two years but higher than the 5-year average. As an overwinter crop, rapeseed plays an important role in crop rotation patterns in many areas of central China. However, problems with toxicity continue to limit the use of rapeseed meal for feed. No major area or production changes are expected in the coming year.

Paulette C. Sandene, (202) 690-0133

DAIRY PRODUCTION IN SELECTED COUNTRIES

Cow milk production in selected countries for 1993 is estimated at 380.1 million tons, essentially unchanged from 1992. Production is forecast to remain at the same level in 1994. Milk cow numbers continue to decline in most countries but higher productivity per-cow is keeping milk production stable. In 1993, production increases in India and Australia largely offset declines in Ukraine and the European Union (EU). In 1994, only the United States and New Zealand are expected to record increases larger than 500,000 tons, with Ukraine and Italy registering declines of the same magnitude.

With respect to the major dairy products, butter and cheese output in 1993 remained near the 1992 level, while production of nonfat dry milk (NDM) increased 5 percent and casein output declined. Butter production in 1993 is estimated at 5.5 million tons. A small decline, to 5.4 million tons, is forecast for 1994. Output of cheese in 1993 is estimated at 10.7 million tons. Production of approximately 10.8 million tons is forecast for 1994. Production of NDM for 1993 is estimated at 2.9 million tons, up 5 percent from 1992. Most of the increase is expected to occur in the EU. NDM production in 1994 is projected to decline 4 percent. Casein output totaled 212,000 tons in 1993, 8 percent below 1992. A marginal decline, to 211,000 tons, is forecast for 1994.

MILK PRODUCTION

North America: Milk production in the United States in 1993 is estimated at 68.7 million tons, down slightly from a year ago. The number of milk cows was 1 percent below 1992, but higher per-cow yields offset most of the adverse affect of a smaller herd size. U.S. milk output in 1994 is forecast to show a small increase, to 69.3 million tons, as per-cow yields continue to rise.

In Canada, a 2-percent increase in the quota for

processing milk deliveries (MSQ) during the 1993/94 marketing year (August 1993 through July 1994) has generated a degree of optimism in the dairy sector because it represents a reversal of the pattern of reductions that has characterized MSQ quotas since 1986. A temporary shortage of milkfat is the likely cause of the expanded quota. Given the quota increase, milk production in 1994 is forecast up 2 percent, to 7.5 million tons.

Mexico's 1993 milk output is estimated at 10.7 million tons, essentially unchanged from 1992, as hurricane activity in the tropical southern regions of the country hampered milk production for part of the season. However, production growth is expected to resume in 1994 with output forecast at 10.9 million tons.

South America: Cow milk production in Brazil increased slightly in 1993, to 15.2 million tons. Although milk production has been trending steadily upward since 1991, the growth rate has been slow for the past two years because producer profits have been low, indicating oversupply. The number of milk cows was down in 1993 and is not expected to expand in 1994, again reflecting producers' concerns about inadequate returns.

Argentina's 1994 milk output is forecast at 7.8 million tons, up 5 percent from 1993 and up 11 percent from 1992. The rapid production growth stems from strong demand and the maturation of major investments in the dairy sector during the past five years.

In Chile, milk production for 1993 is estimated at 1.8 million tons, up 10 percent from 1992. An additional 3-percent increase is forecast for 1994 as the dairy herd expands. Chile's dairy herd is expected to continue expanding during the next two to three years due to increasing demand for milk and milk products.

Milk production in Venezuela during 1994 is

forecast to increase for the third consecutive year, to 1.7 million tons. The upward trend reflects the fact that the dairy sector has nearly completed long overdue structural adjustments that became necessary when the 1989 restructuring of the foreign exchange system sharply boosted the cost of feed and other inputs.

European Union: Milk production during 1993 and the forecast for 1994 are down despite some easing of the EU's quota system in 1993/94 (April/March). Most of the decline is expected to occur in Italy where production has consistently been above-quota.

Germany's milk production in 1993 totaled 28.2 million tons, slightly above 1992. The upturn though small, indicates that most of the structural adjustments needed to fully integrate the dairy sector of the eastern region with that of the rest of the country have been accomplished. The decline in dairy cow numbers in the eastern part of Germany was less than the decline in the western part. Additionally, per-cow milk yields in the east attained parity with those in the west. Because production in 1994 will be tempered by the EU quota system, milk output is forecast up marginally to 28.3 million tons.

French milk production in 1993 is estimated at 25.0 million tons, slightly below 1992. The French Government continues to offer a "buy-out" program and small, inefficient producers are using the incentives to leave the industry. Consequently production is forecast to decline again in 1994, to 24.9 million tons.

Italian milk production during 1993 declined for the third consecutive year, to 10.8 million tons. However, with the downturn in production and the recent upward adjustment in its quota, Italian milk production is expected to be near-quota for 1993/94 (April/March). Each year since the quota system was implemented in the mid-1980's, Italian milk production has been significantly above-quota. The dairy sector's current debt for past over-quota production is

equivalent to US\$1.5 billion. For 1994, milk production is forecast to decline, to 10.3 million tons, as the dairy sector attempts to avoid additional penalties for over-quota production.

Milk output in the Netherlands during 1993 rose 1 percent, to 11.0 million tons. Milk cow numbers were down, but favorable pasture conditions stimulated an increase in per-cow milk yields. With the continuing decline in cow numbers and only normal per-cow yields, 1994 output is forecast to decline 2 percent, to 10.8 million tons.

Eastern Europe: Milk production in Eastern European continues to decline. Poland's output was down 3 percent in 1993, to 12.7 million tons, and a further decline is forecast for 1994. Production in Romania dropped 6 percent in 1993, to 3.5 million tons, and a marginal downturn is projected for 1994. Poor returns on sales and shortages of quality inputs, particularly feeds, continue to plague the dairy sectors in both countries.

Former Soviet Union: After several years of sharp declines, Russia's 1993 milk production stabilized at 47.2 million tons. However, output in Ukraine declined 5 percent in 1993, to 18.1 million tons. The absence of growth in both countries indicates that their dairy sectors continue to be adversely affected by shortages of quality forages and feedgrains and their countrys' poor economic climates. In both countries the process of restructuring the economy has generally resulted in withdrawal of consumer subsidies for dairy products. On the production side, government actions have provided support for feed grain prices, but have reduced or eliminated subsidies for manufacture of dairy feed increasing the cost-price squeeze on milk producers.

Asia: China's milk production continues to trend upward, reaching 5.1 million tons in 1993 and potentially 5.3 million in 1994. Despite these moderate increases, China's dairy sector is experiencing price and payment problems. During the past year, weakening demand has

kept milk prices stable while feed and other input costs continued to rise. Additionally, during 1993, a number of processing plants had trouble selling dairy products and, as a result, had no funds to pay farmers. Until demand improves, China's dairy sector is unlikely to resume its past pattern of rapid growth.

Japan's 1994 milk output is forecast at 8.6 million tons, down from 8.7 million in 1993. Demand was weak in 1993 due to the country's continuing economic recession and cool summer weather. This resulted in low returns to milk producers who then began to cutback on production.

Oceania: Milk production in Australia totaled 7.5 million tons in 1993 (July 1992-June 1993), up 9 percent from 1992. Victoria, the major dairy province, experienced another year of excellent pasture conditions and favorable prices. A small decline is forecast for 1994 as per-cow yields return to more normal levels.

New Zealand's 1993 (June 1992-May 1993) milk production increased 2 percent, to a record 8.7 million tons, due to good pasture conditions and favorable prices. Output in 1994 is forecast up 9 percent, to 9.5 million tons, due to excellent pasture conditions and favorable prices during the first half of the season.

BUTTER PRODUCTION

Butter production in selected countries for 1993 is estimated at 5.5 million tons, essentially unchanged from 1992. Production in 1994 is forecast to decline 1 percent.

North America: Butter production in the United States during 1993 is estimated at 598,000 tons, 3 percent below 1992, mainly due to the decline in milk production. A 6-percent decline, to 565,000 tons, is forecast for 1994 as more milk is diverted to cheese production.

Canada's butter output in 1994 is forecast at 89,000 tons, 2 percent above 1993. The increase forecast for 1994 reflects more butter

being consumed by the domestic market. This represents a successful outcome in response to promotional efforts by the Government and the dairy industry to increase butter use.

European Union: The EU's 1993 and 1994 output of butter are forecast at 1.6 million tons, essentially unchanged from 1992. The small declines in milk production that are being forecast for various member countries are expected to be offset by reduced production of other dairy products, leaving approximately the same quantity of milk available for butter manufacture.

Oceania: Butter production in Australia for 1993 is estimated at 132,000 tons, up 18 percent from 1992. The sharp increase in milk supplies caused the large upturn in butter production. Most of the additional butter supplies were exported. With little change expected in 1994 milk production and as more milk is diverted for cheese production, butter output in 1994 is expected to drop back to 125,000 tons.

After three years of declining production, New Zealand's butter output is expected to rebound to 275,000 tons in 1994. The upturn hinges on continuation of favorable producer prices and the accuracy of the forecast for milk supplies for processing--which are expected to be plentiful in 1994.

CHEESE PRODUCTION

Cheese production in selected countries for 1993 is estimated at 10.7 million tons, unchanged from the 1992 level. Growth of about 1 percent is forecast for 1994.

North America: U.S. cheese production in 1993 totaled 2.9 million tons, essentially unchanged from 1992. A 3 to 4 percent increase is anticipated for 1994. Both estimates reflect changes in milk production, i.e., static milk production in 1993 and a projected increase in 1994.

European Union: Cheese output in the EU increased marginally in 1993, to 5.1 million tons. Output in 1994 is forecast at about the same level even though record output is anticipated in France and the Netherlands due to strong domestic and export demand. German production increased 4 percent in 1993, to 814,000 tons, as consumption recovered from the sharp downturn that followed reunification. A slight increase is forecast for 1994 as production expands to accommodate demand. In Italy, a production surplus limited cheese production in 1993 to 885,000 tons. A decline to 880,000 tons is forecast for 1994.

Oceania: Cheese production continues to expand in Australia and New Zealand. In Australia, production was up 6 percent in 1993, to 209,000 tons. Output is projected to increase an additional 3-percent in 1994 by absorbing milk supplies that otherwise might have gone for butter production. Cheese production in New Zealand increased 6 percent in 1993, to 145,000 tons. The forecast for 1994 is 175,000 tons, a 21-percent jump from 1993, mainly because of plentiful milk supplies.

NONFAT DRY MILK PRODUCTION

Production of nonfat dry milk (NDM) in selected countries in 1993 totaled 2.9 million tons, up 5 percent from 1992 due to larger output in the EU. Because production of NDM in the EU is forecast to decline in 1994, the world commercial total is projected down 4 percent in 1994.

EU production was up 4 percent in 1993, to 1.2 million tons, mainly due to larger output in Germany, the United Kingdom, and Ireland where reduced demand for casein and full-fat dry milk increased the supply of milk available for NDM production. In 1994, reduced milk production plus a return to more normal demand levels for full-fat dry milk are forecast to cause output of NDM to fall to 1.1 million tons.

Production of NDM in New Zealand dropped to 150,000 tons in 1993, down 7 percent from

1992, because export demand was greater for whole dried milk. A small production increase is forecast for 1994 in response to the upturn projected in milk production.

CASEIN PRODUCTION

Casein production in selected countries for 1993 is estimated at 212,000 tons, down 8 percent from 1992. With continued weak demand on international casein markets, a small decrease is forecast for 1994.

EU production dropped 13 percent in 1993, to 120,000 tons, as weak export demand reduced the incentive for casein production. Output in the EU is expected to remain at about the same level in 1994 because producers expect international prices to remain low.

Casein output in New Zealand remained stable in 1993, at 74,000 tons, as weak demand offset the impact of increased milk supplies. However, given the large increase in milk production forecast for 1994, a marginal increase in casein production, to 75,000 tons, is forecast for 1994.

Arthur Coffing, (202) 720-0885

TABLE 25

MILK COW NUMBERS IN SELECTED COUNTRIES
(1,000 Head)

	1989	1990	1991	1992	1993 1/	1994 2/
Canada	1,394	1,371	1,328	1,297	1,263	1,280
Mexico	6,300	6,410	6,440	6,470	6,480	6,480
United States	10,126	10,127	9,992	9,839	9,721	9,575
NORTH AMERICA	17,820	17,908	17,760	17,606	17,464	17,335
Argentina	2,150	2,000	2,000	2,100	2,200	2,300
Brazil	14,650	15,100	15,500	16,000	15,800	15,800
Chile	640	645	645	700	740	760
Peru	685	620	563	550	580	590
Venezuela	1,210	1,170	1,120	1,181	1,267	1,270
SOUTH AMERICA	19,335	19,535	19,828	20,531	20,587	20,720
Belgium-Luxembourg	930	926	890	849	802	782
Denmark	764	770	769	746	708	700
France	5,574	5,489	5,200	4,900	4,700	4,600
Germany	6,960	6,680	6,016	5,382	5,252	5,250
Greece	226	242	245	235	230	230
Ireland	1,387	1,400	1,322	1,293	1,262	1,257
Italy	2,973	2,925	2,881	2,535	2,443	2,350
Netherlands	1,888	1,855	1,775	1,739	1,710	1,690
Portugal	414	398	403	404	381	379
Spain	1,880	1,834	1,650	1,600	1,400	1,300
United Kingdom	3,142	3,220	3,206	3,149	3,121	3,121
EUROPEAN UNION	26,138	25,739	24,357	22,832	22,009	21,659
Austria	887	883	865	841	825	815
Finland	509	492	441	427	407	400
Sweden	560	555	505	490	490	500
Switzerland	795	785	781	768	762	760
OTHER WESTERN EUROPE	2,751	2,715	2,592	2,526	2,484	2,475
Poland	4,990	4,964	4,577	4,363	4,111	3,900
Romania	2,030	1,990	1,600	1,710	1,530	1,500
EASTERN EUROPE	7,020	6,954	6,177	6,073	5,641	5,400
Russia	20,825	20,760	20,557	20,600	20,200	19,900
Ukraine	8,567	8,528	8,378	8,263	7,900	7,500
Former USSR	29,392	29,288	28,935	28,863	28,100	27,400
China	2,222	2,691	2,946	3,139	3,200	3,300
India 3/	29,000	32,100	30,700	31,000	31,800	31,800
Japan	1,066	1,081	1,082	1,081	1,084	1,080
ASIA	32,288	35,872	34,728	35,220	36,084	36,180
Australia 4/	1,663	1,631	1,629	1,632	1,636	1,650
New Zealand 5/	2,562	2,621	2,723	2,642	2,723	2,805
OCEANIA	4,225	4,252	4,352	4,274	4,359	4,455
TOTAL	138,969	142,263	138,729	137,925	136,728	135,624

1/ Preliminary.

2/ Forecast.

3/ Year beginning April 1 of the year shown.

4/ Year ending June 30 of the year shown.

5/ Year ending May 31 of the year shown.

February 1994

Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 26

COW MILK PRODUCTION IN SELECTED COUNTRIES

(1,000 Metric tons)

	1989	1990	1991	1992	1993 1/	1994 2/
Canada	7,980	7,975	7,790	7,488	7,360	7,500
Mexico	8,970	9,330	10,200	10,700	10,720	10,870
United States	65,424	67,276	67,348	68,831	68,700	69,250
NORTH AMERICA	82,374	84,581	85,338	87,019	86,780	87,620
Argentina	6,725	6,400	6,400	7,000	7,400	7,800
Brazil	13,400	14,500	14,200	15,000	15,200	15,300
Chile	1,270	1,420	1,490	1,590	1,750	1,800
Peru	652	565	645	620	640	660
Venezuela	1,688	1,662	1,505	1,575	1,655	1,660
SOUTH AMERICA	23,735	24,547	24,240	25,785	26,645	27,220
Belgium-Luxembourg	3,917	3,901	3,808	3,775	3,762	3,744
Denmark	4,747	4,742	4,640	4,605	4,650	4,600
France	26,150	26,400	25,700	25,300	25,000	24,900
Germany	32,400	31,200	28,916	28,106	28,200	28,280
Greece	675	735	695	690	695	690
Ireland	5,575	5,623	5,539	5,588	5,528	5,523
Italy	10,828	11,491	11,400	11,300	10,800	10,300
Netherlands	11,321	11,285	11,047	10,901	11,000	10,750
Portugal	1,420	1,519	1,542	1,741	1,730	1,760
Spain	6,000	6,200	6,100	6,000	5,800	5,600
United Kingdom	14,647	14,952	14,503	14,411	14,570	14,390
EUROPEAN UNION	117,680	118,048	113,890	112,417	111,735	110,537
Austria	3,318	3,315	3,296	3,254	3,220	3,200
Finland	2,729	2,752	2,555	2,467	2,443	2,433
Sweden	3,420	3,520	3,220	3,200	3,349	3,455
Switzerland	3,889	3,843	3,931	3,873	3,870	3,869
OTHER WESTERN EUROPE	13,356	13,430	13,002	12,794	12,882	12,957
Poland	16,371	15,801	14,504	13,060	12,650	12,500
Romania	4,150	4,775	4,100	3,760	3,520	3,480
EASTERN EUROPE	20,521	20,576	18,604	16,820	16,170	15,980
Russia	55,742	55,715	51,971	47,200	47,200	47,500
Ukraine	24,237	24,360	22,409	19,078	18,100	17,500
Former USSR	79,979	80,075	74,380	66,278	65,300	65,000
China	3,813	4,157	4,646	5,031	5,100	5,300
India 3/	24,000	27,500	28,200	29,400	30,500	30,500
Japan	8,059	8,190	8,260	8,581	8,700	8,600
ASIA	35,872	39,847	41,106	43,012	44,300	44,400
Australia 4/	6,465	6,435	6,578	6,918	7,530	7,502
New Zealand 5/	7,406	7,746	8,122	8,603	8,735	9,505
OCEANIA	13,871	14,181	14,700	15,521	16,265	17,007
TOTAL	387,388	395,285	385,260	379,646	380,077	380,721

1/ Preliminary.

2/ Forecast.

3/ Year beginning April 1 of the year shown.

4/ Year ending June 30 of the year shown.

5/ Year ending May 31 of the year shown.

February 1994

Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 27

BUTTER PRODUCTION IN SELECTED COUNTRIES

(1,000 Metric tons)

	1989	1990	1991	1992	1993 1/	1994 2/
Canada	99	100	97	86	87	89
Mexico	33	34	31	28	32	32
United States	588	591	606	619	598	565
NORTH AMERICA	720	725	734	733	717	686
Argentina	45	40	38	37	48	53
Brazil	65	75	70	65	68	70
SOUTH AMERICA	110	115	108	102	116	123
Belgium—Luxembourg	89	87	82	75	76	75
Denmark	92	93	71	62	60	58
France	525	514	496	444	435	437
Germany	711	640	555	474	479	480
Greece	6	6	7	7	7	6
Ireland	156	159	146	142	137	137
Italy	74	80	80	76	75	74
Netherlands	213	209	196	191	193	190
Portugal	12	15	15	16	17	18
Spain	30	46	38	29	27	25
United Kingdom	130	138	112	99	103	100
EUROPEAN UNION	2,038	1,987	1,798	1,615	1,609	1,600
Austria	41	40	42	43	44	43
Finland	63	63	60	56	57	57
Sweden	70	76	63	65	69	72
Switzerland	39	38	40	38	38	38
OTHER WESTERN EUROPE	213	217	205	202	208	210
Poland	325	300	220	180	165	160
Romania	46	33	23	20	18	18
EASTERN EUROPE	371	333	243	200	183	178
Russia	820	833	729	746	700	710
Ukraine	441	444	376	345	325	310
Former USSR	1,261	1,277	1,105	1,091	1,025	1,020
India 3/	880	970	1,020	1,060	1,110	1,110
Japan	78	76	76	95	100	85
ASIA	958	1,046	1,096	1,155	1,210	1,195
Australia 4/	96	111	111	112	132	125
New Zealand 5/	246	276	269	268	267	275
OCEANIA	342	387	380	380	399	400
TOTAL	6,013	6,087	5,669	5,478	5,467	5,412

1/ Preliminary.

2/ Forecast.

3/ Year beginning April 1 of the year shown.

4/ Year ending June 30 of the year shown.

5/ Year ending May 31 of the year shown.

February 1994

Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 28

CHEESE PRODUCTION IN SELECTED COUNTRIES
(1,000 Metric tons)

	1989	1990	1991	1992	1993 1/	1994 2/
Canada	247	255	262	262	265	267
Mexico	373	384	395	390	395	400
United States	2,546	2,749	2,730	2,943	2,932	3,035
NORTH AMERICA	3,166	3,388	3,387	3,595	3,592	3,702
Argentina	260	270	290	310	315	330
Brazil	220	200	210	215	200	200
Venezuela	94	96	84	70	72	74
SOUTH AMERICA	574	566	584	595	587	604
Belgium-Luxembourg	38	42	45	51	52	53
Denmark	275	293	285	290	315	315
France	1,485	1,471	1,500	1,530	1,535	1,540
Germany	885	749	777	783	814	820
Greece	210	200	210	200	203	202
Ireland	74	72	73	95	96	96
Italy	760	811	885	890	885	880
Netherlands	568	593	610	636	641	643
Portugal	55	49	57	65	64	62
Spain	123	133	152	154	142	135
United Kingdom	280	316	303	324	317	316
EUROPEAN UNION	4,753	4,729	4,897	5,018	5,064	5,062
Austria	88	87	83	84	83	82
Finland	78	81	72	76	76	75
Sweden	109	108	107	110	115	120
Switzerland	137	138	142	141	141	141
OTHER WESTERN EUROPE	412	414	404	411	415	418
Poland	130	126	111	101	103	104
Romania	82	91	97	95	90	90
EASTERN EUROPE	212	217	208	196	193	194
Russia	460	458	394	295	280	275
Ukraine	184	184	162	160	140	130
Former USSR	644	642	556	455	420	405
Japan	27	28	27	30	32	35
Australia 3/	190	175	178	197	209	215
New Zealand 4/	128	122	125	137	145	175
OCEANIA	318	297	303	334	354	390
TOTAL	10,106	10,281	10,366	10,634	10,657	10,810

1/ Preliminary.

2/ Forecast.

3/ Year ending June 30 of the year shown.

4/ Year ending May 31 of the year shown.

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TABLE 29

NONFAT DRY MILK PRODUCTION IN SELECTED COUNTRIES
(1,000 Metric tons)

	1989	1990	1991	1992	1993 1/	1994 2/
Canada	93	93	77	55	52	56
Mexico	6	9	9	12	18	20
United States	397	399	398	396	420	380
NORTH AMERICA	496	501	484	463	490	456
Argentina	45	34	26	25	50	66
Brazil	50	60	55	55	40	50
Chile	4	5	5	4	4	4
Venezuela	2	2	2	3	3	3
SOUTH AMERICA	101	101	88	87	97	123
Belgium-Luxembourg	98	94	75	52	64	65
Denmark	13	41	17	13	19	10
France	492	580	453	405	380	350
Germany	500	509	539	395	423	390
Ireland	140	200	188	126	140	150
Italy	0	0	0	0	0	0
Netherlands	83	70	52	50	60	55
Portugal	10	15	12	12	11	10
Spain	31	46	30	23	16	12
United Kingdom	133	166	143	101	110	102
EUROPEAN UNION	1,500	1,721	1,509	1,177	1,223	1,144
Austria	21	24	28	28	30	29
Finland	26	22	20	15	16	16
Sweden	48	51	31	30	39	48
Switzerland	33	32	30	26	25	25
OTHER WESTERN EUROPE	128	129	109	99	110	118
Poland	174	175	145	139	139	120
EASTERN EUROPE	174	175	145	139	139	120
Russia	143	143	145	131	119	120
Ukraine	76	77	70	59	53	50
Former USSR	219	220	215	190	172	170
India 3/	90	72	65	65	75	75
Japan	178	179	181	206	230	235
ASIA	268	251	246	271	305	310
Australia 4/	127	144	156	155	183	173
New Zealand 5/	181	208	172	162	150	154
OCEANIA	308	352	328	317	333	327
TOTAL	3,194	3,450	3,124	2,743	2,869	2,768

1/ Preliminary.

2/ Forecast.

3/ Year beginning April 1 of the year shown.

4/ Year ending June 30 of the year shown.

5/ Year ending May 31 of the year shown.

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Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 30

CASEIN PRODUCTION IN SELECTED COUNTRIES

(1,000 Metric tons)

	1989	1990	1991	1992	1993 1/	1994 2/
Denmark	19	13	16	16	14	15
France	47	26	33	36	30	30
Germany	22	16	16	20	15	17
Ireland	32	28	27	40	35	33
Netherlands	20	30	22	25	25	25
United Kingdom	1	2	1	1	1	1
EUROPEAN UNION	141	115	115	138	120	121
Poland	33	38	21	14	12	10
Australia 3/	7	5	3	4	6	5
New Zealand 4/	56	64	64	74	74	75
OCEANIA	63	69	67	78	80	80
TOTAL	237	222	203	230	212	211

1/ Preliminary.

2/ Forecast.

3/ Year ending June 30 of the year shown.

4/ Year ending May 31 of the year shown.

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